Short -Term Growth Management Strategy

Information Update 1991-1995

Prepared by the
Directors' Growth Management Steering Committee
October 1990

THE CITY OF CALGARY
PLANNING & BUILDING DEPARTMENT

SHORT-TERM GROWTH MANAGEMENT STRATEGY

INFORMATION UPDATE 1991 - 1995

Prepared by the
GROWTH MANAGEMENT TECHNICAL COMMITTEE
for the
DIRECTORS' GROWTH MANAGEMENT STEERING COMMITTEE

OCTOBER 1990

PUBLISHING INFORMATION

TITLE:	SHORT-TERM GROWTH MANAGEMENT STRATEGY INFORMATION UPDATE 1991-1995
AUTHOR:	DIRECTORS' GROWTH MANAGEMENT STEERING COMMITTEE
STATUS:	AVAILABLE FOR INFORMATION PURPOSES
PRINTING DATE:	OCTOBER, 1990
ADDITIONAL COPIES:	THE CITY OF CALGARY PLANNING INFORMATION CENTRE P.O. BOX 2100, POSTAL STATION 'M' CALGARY, ALBERTA T2P 2M5 (403) 268-5333

COMMENTS:THIS INFORMATION UPDATE WAS PREPARED BY AN INTER-DEPARTMENTAL COMMITTEE. ENQUIRIES AND COMMENTS SHOULD BE ADDRESSED TO THE CHAIRMAN, GROWTH MANAGEMENT TECHNICAL COMMITTEE, IN THE PLANNING & BUILDING DEPARTMENT (268-5331)

91-02846/

TABLE OF CONTENTS

		PAGE
EXECUTIVE SUMMARY		2
FOREWORD		4
1.	PURPOSE OF THE UPDATE	5
2.	ECONOMIC OUTLOOK: 1991 - 1995	6
3.	POPULATION GROWTH: 1990 - 1995	7
4.	HOUSING FORECASTS: 1991 - 1995	8
5.	SUBURBAN RESIDENTIAL LAND REQUIREMENTS: 1991 - 1995	9
6.	INDICATORS OF MARKET SHARE, BY SECTOR	10
7.	LAND AVAILABLE FOR RESIDENTIAL DEVELOPMENT, BY SECTOR	13
8.	PROBABLE SUPPLY/DEMAND CONDITIONS, BY SECTOR, 1991 - 1995	16
9.	SERVICING IMPLICATIONS	22
10.	CONCLUSIONS	28

APPENDICES

APPENDIX I:	TABLES, FIGURES AND MAPS
APPENDIX II:	SECTOR PROFILES
APPENDIX III:	DEVELOPMENT INDUSTRY COMMENTS

EXECUTIVE SUMMARY

The information presented in this report reflects a view of the immediate and five year residential land situation in Calgary, as it appears at this point in time. A key purpose of this report is to examine the expected fit between residential land demand and supply over the coming five year period. The intent is to ensure that there exists a sufficient supply of readily developable land, in a variety of locations, to facilitate competitive land and housing markets, while avoiding premature municipal investment in utilities and services. It is fully recognized that supply and demand conditions are in a constant state of flux and that it is important to monitor changes on an ongoing basis and to undertake a similar review of circumstances annually.

On the basis of the analysis presented in this report, the Directors' Growth Management Steering Committee wishes to put forward the following conclusions for Council's information:

1. Calgary appears to be entering a period of sustained economic growth that may result in a population growth of 17,500 - 19,000 people/year;

2. This growth may generate a demand for 4,200 new single family units in 1991, increasing to 5,200 units in 1995 (most realistic scenario), resulting in an increase of 23,700 new units in total, by 1995.

3. The demand for new housing in suburban areas could utilize an estimated 4,740 acres of land over 5 years (an average of 948 acres/year);

4. There exists a sufficient supply of land with "Utility Capacity in Place" (i.e. with minimal servicing cost to the City) to satisfy this amount of demand on a city-wide basis for the next four years (through 1994), with some cushion of protection should actual growth exceed the projections in the near future. **However, without additional service extensions there will likely be serviced land shortages in particular sectors by 1993.**

On the basis of the forecasts and allocations contained in this report, and if a reasonable float of lands with "Utility Capacity in Place" is to be maintained in each sector, the City should be prepared to undertake or facilitate utility extensions in each sector in the years shown below, and so ensure that serviced land shortages do not occur:

		PROBABLE YEAR FOR COMMENCING CONSTRUCTION OF UTILITY EXTENSIONS	UTILITY REQUIRED
1.	NORTH	1991-1992	water and possibly sanitary*
2.	NORTHEAST	1992-1993	stormwater management
3.	EAST	none expected	
4.	SOUTHEAST	1993	storm and sanitary
5.	SOUTH	1994	storm and sanitary
6.	SOUTHWEST	1991	sanitary
7.	WEST	1991	storm
8.	NORTHWEST	after 1995	

*Two alternative areas exist in this sector for which utility extensions could be undertaken.

This information will be considered in developing the City's 1991-1995 capital budget programs.

5. In terms of transportation requirements, the road improvements currently included in the City's five year capital budget forecast should be sufficient to provide access to most areas with utility capacity now in place (refer to Sections 8 and 9). However, with additional areas opening up for development and the overall growth of the city, the level of service of the transportation system will be reduced without additional expenditures beyond those in the City's current budget envelope.

6. **Notwithstanding the above, the City should also anticipate requests from individual developers to service lands which do not, at present, have utility capacity in place.** Council's Short-Term Growth Management Strategy provides an effective process in which these requests can be evaluated on their own merits and brought forward to Council for consideration.

FOREWORD

The land development and house-building industries attempt to be as responsive to changes in the marketplace as possible. The factors that dictate which geographic areas or types of housing will be most active at any point in time vary with consumer preferences, interest rates, house prices, expectations for the future, competition in the marketplace and many other related factors.

In the development of residential land, that is, in its transition from "raw" land (i.e. vacant or in agricultural use) to fully-serviced, subdivided, "ready-to-build-on" lots, a good deal of speculation may exist as to when specific parcels of land will be serviced and made available for house construction. **The amount of development in any given year is not certain, nor is its distribution among competing builders, developers and communities.**

Within this changing and, at times, volatile environment, the City is called upon to provide utilities and transportation services to enable the "bringing on-stream" of new lands for development. The timing of expenditures for sewers, water and other utilities must occur prior to housing construction - which itself is in response to a changing marketplace. Some transportation facilities may be provided much later, as areas develop more fully.

Services that remain underutilized are, in the short-term, generally financed by the City. **The challenge facing the City then, is to be prudent in avoiding the premature extension of costly utilities and services while making every effort to support a competitive, efficient land development process.** This ongoing "balancing" occurs in several forums at the same time (e.g. planning and subdivision approvals, budgeting processes, utility construction scheduling). To assist this balancing process, a shared view of the future is both helpful and necessary.

This report is designed to provide an accurate and current description of recent suburban residential development activity in Calgary and to forecast activity for the 1991 - 1995 period. **The report does not contain policy recommendations nor explicit budget priorities** - its contribution lies in providing a solid information base upon which discussions pertaining to many aspects of planning, development and budgeting can be based.

1. PURPOSE OF THE UPDATE

This report provides a current information base describing Calgary's expected housing demand and residential land supply in suburban areas for the coming five year period (1991 - 1995). This information base is up-dated annually, under the auspices of the Short-Term Growth Management Strategy, as approved by Council in February, 1985.

The report is intended to be used in two ways:

1. to provide a common information base and set of assumptions (related to the next 5 years' growth) for Civic Departments to refer to in preparing their annual capital budget proposals; and

2. to provide the Directors' Growth Management Steering Committee with a detailed and up-to-date analysis of suburban growth dynamics, providing a framework in which to evaluate the merits of individual requests for unbudgeted service extensions in suburban areas.

The information base has been developed jointly by staff in several Civic departments, coordinated through the inter-departmental Growth Management Technical Committee. The Committee includes representatives of the following departments:

Planning and Building
Transportation
Land
Parks and Recreation
Calgary Economic Development Authority
Emergency Medical Services
Engineering and Environmental Services
Corporate Resources
Finance
Electric System
Police
Fire
Calgary Public Library

In addition, planners from the Calgary Board of Education and the Calgary Separate School Board actively participate on the Technical Committee. In preparing this report, the Committee consulted with representatives of the Urban Development Institute and the Calgary Home Builders' Association.

A draft of this report was circulated to the Urban Development Institute and Calgary Home Builders' Association during the months of July and August 1990. Meetings were held to identify their views, concerns and suggestions prior to finalizing the report.

2. ECONOMIC OUTLOOK: 1991 - 1995

The most current formal analysis of Calgary's economic prospects for the coming five year period, as viewed by the City Administration, is contained in the recently released report entitled, **"CALGARY ECONOMIC OUTLOOK, 1991 - 1995"**, (October 1990). The report discusses economic prospects at the national, provincial and local levels. The report highlights the following prospects for the provincial economy and Calgary.

- The province of Alberta is expected to experience real economic growth, above the national average over the entire forecast period.

- Interest rates are expected to decline gradually to approximately 11% by late 1991. A 10% to 11% interest rate range is anticipated for the 1992-1995 period.

- In the short run, higher oil prices in the mid $30 (US) per barrel range will result in 1990 oil prices averaging approximately $24 (US) per barrel. While a Middle East conflict is possible, a stronger possibility is a peaceful solution to the crisis, with oil prices adjusting to a $22 level in the latter part of 1991, together with some semblance of both price and production stability. Oil prices are then expected to increase at approximately 4.5% (average inflation) per year over the forecast period.

- Oil price stability in the post-1991 period, above $22 (US), is expected to encourage numerous investments in conventional exploration, drilling and production, synthetic energy development, heavy oil and alternative fuels projects in the province. Both domestic and US demands for supplies of Alberta's natural gas are expected to increase substantially, accompanied by a corresponding increase in pipeline capacity to accommodate this increased flow.

- While farm incomes are weakened by low prices, grain output is expected to increase over the five year period. The demand for Alberta livestock is expected to strengthen and provincial output in this sector will also increase.

- Alberta will see above average demands placed upon manufacturing, transportation, trade and services sectors over the forecast period.

- In both the short and medium term, the local Calgary economy appears better poised to weather the recessionary impacts than other areas of Canada. Calgary is also expected to continue its diversification through increased economic activity and stronger-than-average employment growth in manufacturing, communications, trade and services sector expansions.

- In the five year forecast period, Calgary's net migration is expected to continue above 8500 migrants per year.

3. POPULATION GROWTH: 1990 - 1995

The most current City population forecasts (as of June 1990) suggest that the city's population will add between 74,400 (LOW forecast) and 106,000 (HIGH forecast) people between 1990 and 1995 (see Table 1). Figure 2 places this forecast in the context of the city's past growth.

The MEDIUM forecast reflects an annual growth of between 17,500 and 19,000 people per year over the 1990 to 1995 period or an average increase of approximately 2.5% annually. Figure 3 compares the MEDIUM forecasted annual level of growth with the growth actually experienced since 1979.

The MEDIUM scenario has been used in forecasting housing demand and residential land requirements for the 1991 - 1995 period, as it offers the most realistic basis for the short-term. A second "contingency" scenario has also been tested to determine the land supply situation which could occur in each sector under conditions of unexpectedly high growth overall, or exceptionally high growth in any particular sector.

4. HOUSING FORECASTS: 1991 - 1995

The demand for new housing is driven by both an increase in the number of households (e.g. an increasing population and/or changes in its composition) and changes in consumer housing needs/ preferences (e.g. the "move-up market", where consumers choose a newer or larger house). In turn, the make-up of the population creating a demand for housing at any point in time will affect the level of demand in particular sectors of the city, as some areas have traditionally served specific market segments.

The likely level of single family housing demand which corresponds to the MEDIUM population forecast is provided on Table 2. **The focus here is on the demand for new single family houses, as they generally occur in new suburban areas and are, for the most part, the driving force behind the demand for new subdivision.** This new subdivision, in turn, creates a need to extend and up-grade municipal infrastructure. As such, the manner in which housing demand is distributed in the marketplace among the various sectors affects the need for and timing of substantial expenditures by the City to service new growth areas.

Overall, it is expected that the annual demand for new single family houses will increase from approximately 4,400 units in 1990 to 5,200 units in 1995 (see Table 2). Figure 4 places this forecasted demand in the context of additions to the single family housing stock since 1979. As Table 3 and Figure 5 indicate, some of the demand for single family houses occurring since 1985 has been met through the take-up of available vacant units, reducing the vacancy rate to 1.29% by April of 1990. This trend towards declining single family vacancy rates has slowed somewhat as existing housing has been released to the market by owners "moving-up" into newly constructed units. However, it is still evident that a large proportion of the total demand for single family housing over the coming five year period will have to be met through the construction of new units.

With the recent interest in developing single family "infill" units in established residential areas there is evidence to suggest that as much as 7 - 10% of new single family starts may be located in the older, non-suburban neighbourhoods. In addition, development of single family housing commenced in 1990 on several significant tracts of vacant land within existing built-up areas, specifically the William Roper Hull property (Woodlands) in the southwest sector and Diamond Cove in the south sector. Since it is unclear as to how significant these factors may be over the coming five year period, allowances have been made to accommodate <u>all</u> forecasted single family housing starts in suburban areas. **In this sense, the level of demand allocated to new suburban areas may be slightly overstated (by 7 - 10%).**

5. SUBURBAN RESIDENTIAL LAND REQUIREMENTS: 1991 - 1995

The demand for residential land in the suburbs is calculated on the basis of **achieving an average density of 5 units per gross residential acre.** This density reflects the average density actually achieved in a large sample of existing suburban communities in Calgary. Individual communities may normally vary from 4 to 7 units per acre in density, depending on a number of factors, some of which include:

- the mix of housing types (i.e. the proportion of single family and multi-family units);
- single family lot sizes; and/or
- the extent of residential-related land uses in the community, (i.e. local commercial sites, school sites, Environmental Reserve and regional open spaces, adjacent transportation facilities).

Variance from this average density within individual communities may result in the build-out of such areas taking a slightly longer time period (if actual densities exceed 5 upa) or a slightly shorter time period (if actual densities are less than 5 upa) than estimated. However, these variations are quite site-specific and are generally of such small magnitude, in terms of their impact on overall land requirements, that they should not materially affect the expected timing of utility extensions at the sector level.

Table 2 provides a breakdown of the annual land requirements associated with the projected level of housing demand to 1995. Overall, **approximately 4,740 gross residential acres of land will be required in suburban locations between 1991 and 1995 - an average of 950 acres per year** (assuming an average density of 5 units/acre). Figure 6 places this land requirement in the context of the subdivision activity which has occurred since the early 1970's. Sections 6 and 8 of this report describe the manner in which the demand for serviced land has been distributed in the past, as well as forecasts of the expected distribution of demand in the future.

6. INDICATORS OF MARKET SHARE, BY SECTOR

6.1 MUNICIPAL CENSUS STATISTICS

Calgary's annual Census figures indicate the net change in single family dwelling units, by sector, and provide one indicator of past market performance.

The distribution of housing construction over the past 5 years has been surprisingly stable in a number of sectors, as illustrated in Table 4. (The delineation of sectors is illustrated on Map 1).

In particular, the East, South and West sectors have maintained a more-or-less consistent market share of new single family housing construction since 1984.

The Northwest sector achieved its greatest market share in the 1985-86 period. Notwithstanding that this sector's share was reduced from a peak of 33% to 20% in 1988-89, it remains the strongest growth corridor in the city at the present time.

The Southwest sector has experienced a declining share since completion of the Woodbine area in 1987-89, although it continued to claim a substantial 16% market share in 1988-89.

The Northeast, until 1986, experienced a steady decline in market share, although the situation turned around quite dramatically in 1986-87, and the sector has maintained a reduced but substantial market share since that time. The same observation can be made of the Southeast sector where there was a gradually declining market share to 1986 and then a substantial market gain in the 1986-89 period. The North sector, as well, has demonstrated a continuous growth in market share over the past five years. Building permit statistics for 1990 (Table 6) suggest that these sectors will continue to maintain a strong market share in the near future.

The average market share, by sector, achieved over the last 5 years, is illustrated in Figure 7. The distribution of market share for the 1988 - 1989 period is shown in Figure 8.

6.2 BUILDING PERMIT APPLICATIONS

Market share in the short-term is probably best reflected in the distribution of recent building permit applications for new single family units, by sector (see Tables 5 and 6, and Figures 9 and 10).

The 1989 distribution of single family building permit applications (Table 5) signalled several shifts in the location of market activity from that reflected in the 1984-1989 census data, namely:

- increased market shares in the North, Northeast and Southeast sectors;
- sustained shares in the East and West sectors; and
- declining shares in the Northwest, South and Southwest sectors.

More recently, the 1990 distribution of building permit applications (Table 6) reflects some shifts in these market share trends, which will be demonstrated in the distribution of fall 1990/winter 1991 construction activity. These data suggest that, in 1990:

- market shares have increased in the North, East and West sectors;
- the South, Southeast and Southwest sectors have generally maintained their positions;
- market shares has declined in the Northeast and Northwest sectors.

Most notable here is the decline in market share seen in the Northwest sector, from its 1989 share of approximately 18% to 13% during the first eight months of 1990. Discussions with the industry have suggested that this decline may have resulted, at least in part, from a shortage of serviced lots in the sector during the early part of 1990. As such, this is seen as a temporary shift and it is expected that the sector will regain much of its traditional position over the forecast period.

6.3 1990 DEVELOPER SURVEY

Each year the Engineering Department surveys the development industry and asks individual developers to identify those lands which they would propose for development (installation of underground utilities) in that year. The results of the most recent survey (January, 1990) are contained in Table 7. The lands referred to in Table 7 are located, generally, on Map 2.

It is important to note that this distribution of market expectations reflects the unique circumstances in each sector with respect to the availability of serviced land, and not necessarily to the expectation of immediate housing construction. The timing and scale of requests for infrastructure extensions relate to a slightly longer time horizon and may be more directly affected by the marketing strategies of individual landowners.

6.4 HOUSING STARTS

In 1989 there were an estimated 5,935 total housing starts in Calgary, of which 5,007 (84%) were for single family units.

The number of single family starts (3,906) for the first eight months of 1990 (Figure 11) represents a substantial increase over the number of starts experienced during a similar period in 1989. Both Figure 11 and Figure 13 (Single Family Building Permit Applications) show that the very high activity levels experienced in late 1989 and early 1990 have now slowed somewhat, leading to a projection of 4,400 Single family starts by year end.

The number of "total" dwelling unit starts (Figure 12) reflects the very strong demand for single family units in both 1989 and 1990, but also indicates a growing demand for duplex and other "multi-unit" accommodation. Although single family units accounted for roughly 85% all housing starts in both 1988 and 1989, the actual number of duplex and multi-family starts has been increasing. In real terms, the 1989 marketplace saw approximately 928 multi-family starts, as compared to 471 starts in 1988. During the first eight months of 1990, approximately 1,050 multi-family units were started, as compared to 584 starts for the comparable period in 1989.

6.5 SUBDIVISION ACTIVITY

Figure 14 illustrates the location of new subdivision activity, by sector, for 1989. Figure 6 places this level of subdivision in an historical perspective and demonstrates the continued increase in subdivision activity which has occurred since 1984.

Figures illustrating the historical rate of subdivision, by sector, are contained in Appendix II.

6.6 OUTLINE AND TENTATIVE PLAN APPROVALS

Figure 15 illustrates the number of acres approved in Outline Plans since 1976. Although 1989 saw the highest volume of land approved since 1981, it is anticipated that 1990 will see a slight decrease from 1989 levels.

High levels of construction activity in late 1989/early 1990 and concerns over a shortage of serviced R1/R2 lots led to a higher level of activity at the Tentative Plan stage for 1989 and 1990 than was experienced up to 1988 (Figure 16). It is anticipated that approximately 7,000 new R1/R2 lots will be approved in 1990, roughly 500 more lots than were approved in 1989 and 3,300 more lots than were approved in 1988.

7. LAND AVAILABLE FOR RESIDENTIAL DEVELOPMENT, BY SECTOR

The land which is considered available for residential development in the suburban market includes vacant lots in new suburban communities, land which is in the process of being subdivided, and those remaining lands which are as yet unsubdivided but have been identified for future residential use.

7.1 CURRENT R1/R2 LOT INVENTORY

An estimate was made of the current inventory of approved R1 and R2 lots in suburban areas in April 1990. Approximately 5,720 lots existed at that time, including those which were serviced, vacant, under construction, or recently approved through Tentative Plans. The status of these lots is changing constantly (e.g. from not-serviced to serviced, from vacant to being under construction). By comparison, the estimated inventory in April of 1989 was 4,764 lots. The larger overall inventory in 1990 (5,720 lots) reflects the very strong level of subdivision activity in late 1989 and early 1990. However, the actual number of vacant lots (excluding those under-construction) has remained relatively constant (3,250 lots in 1990 vs 3,284 in 1989), reflecting the higher levels of construction activity in the early part of this year.

The estimated suburban R1/R2 lot supply, by sector, is described in Table 8. Figure 17 illustrates the distribution of that supply by sector.

7.2 "SHALLOW UTILITIES" RESIDENTIAL LOT INVENTORY

Another inventory of available single family lots in suburban areas exists in the Shallow Utilities Residential Lot Survey, compiled annually by the City's Electric System. The latest survey was undertaken in late 1989 and the inventory of vacant serviced lots, at that time, is presented in Table 9 and illustrated in Figure 18. The statistics indicate that there were approximately 2,259 serviced vacant residential lots with shallow utilities "in place" in suburban areas as of December 1, 1989.

These survey results showed the lowest inventory levels since the survey began in 1980 (Figure 18), as small inventories were maintained and new lot production reflected actual building expectations. The dramatic increases in construction activity which occurred in late 1989 and early 1990 led to concerns over lot shortages in the early part of this year. These concerns have since eased as the pace of construction has slowed while the rate of new lot production has remained fairly strong.

7.3 UNSUBDIVIDED RESIDENTIAL LAND SUPPLY

The current unsubdivided suburban residential land supply is indicated, by sector, in Table 10. The distribution of that land supply is shown on Figure 19 and in Appendix II. **Overall, there exists an estimated 20,390 gross residential acres intended for residential and related uses.** Detailed maps of the serviced land supply, by sector, are contained in Appendix II.

It should be noted that this inventory does not include large areas of land annexed to the City in July 1989. These annexed lands, which comprise approximately 39,000 acres in total, will accommodate a wide range of uses in addition to residential, including industrial, commercial, recreational,

environmentally sensitive areas, lands for major transportation facilities and public services as well as large areas devoted to the Transportation and Utility Corridor. As such, the major portion of the newly annexed lands will be dealt with separately from the residential land inventory until formal planning policies are in place and/or more extensive technical analysis is undertaken to determine the likely developable residential components. The only portions of the annexed lands which have been included in the current inventory are smaller residual parcels inside of the T.U.C. which form logical extensions of existing development cells.

The lands included in the inventory are grouped according to the availability of water and sewer services, as this infrastructure must be in place before development can proceed.

The coding of the areas having "Utility Capacity in Place", as described in Section 7.3.1., indicates that the major utility services are in place, (or will be provided by the developers without major City expenditures), although the land is neither subdivided nor developed with on-site services.

The two remaining categories (Sections 7.3.2 and 7.3.3) describe lands with some, but not all, utility capacity in place ("Some Utility Capacity in Place") or lands having no capacity in place ("No Utility Capacity in Place"). The colours on their accompanying service maps do not take into account the availability of transportation capacity, which is discussed throughout the text, nor do they reflect the magnitude of cost estimates for the missing services. **As such, it cannot be assumed that areas having "some" capacity in place are necessarily less costly to service (including transportation infrastructure) than those having "no" capacity in place - their relative cost depends very much on the unique circumstances in each area.**

(The reader may find it helpful to refer to Report #3 of the City's Long-Term Growth Management Strategy, entitled "Major Municipal Servicing Requirements", for a more detailed description of servicing needs and cost estimates in each area.)

In light of the above, the coding of these two categories should not be construed to imply the intended sequence of development, as their servicing cost and attractiveness to the market will be the main determinants of when individual areas are brought on-stream.

As noted above, transportation requirements may impose a further constraint on development, but the extent of constraint may vary from situation to situation. Although the required transportation facilities may be substantial in some situations, there is a greater degree of flexibility in the timing of the expenditures as the transportation facilities are not generally required in their final form until substantial development has occurred.

Notwithstanding the above, it must be emphasized that some of the areas discussed below, while having all or some utility capacity in place, may also have major transportation constraints which affect their developability in the 1991 - 1995 period, (refer to Section 8).

It should also be noted that although the City may not be responsible for constructing major servicing projects in all developing areas, it may still need to budget for "oversize" costs associated with various transportation and utility improvements constructed by private developers.

7.3.1 Areas with "Utility Capacity in Place"

Within each sector, there exists a supply of land which is immediately developable in the sense that capacity in all major (acreage assessment) water and sewer (storm and sanitary) facilities is in place.

These lands are not, as yet, subdivided, nor do they have on-site services in place. There is, however, capacity in the utility "system" to accommodate their development without requiring City expenditures for major assessment trunks, watermains, reservoirs, etc. In this sense, they are considered to have utility capacity in place. **Of these areas, those with transportation system constraints are identified in Section 8.**

Each of the areas identified as having "Utility Capacity in Place" (shown as the red areas on Map 3) could develop without the City incurring major capital expenditures with respect to utility extensions. "Major expenditures" would include servicing elements which are normally included in the acreage assessment system, but do not include regular development related costs such as boundary and oversize payments. These areas could accommodate approximately 23,760 single family units at 5 units/acre. In addition, unsubdivided lands already designated for multi-family uses could accommodate a further 2,531 multi-family units. (Separate maps showing the location of these lands in each sector are included in Appendix II).

It is to be noted that although each of these areas, in isolation, could develop without major expenditures for water and sewer lines, **The cumulative effects of simultaneous development in all of these areas could result in a need for improvements in the downstream servicing facilities.**

7.3.2 Areas Having "Some Utility Capacity in Place"

In the areas having "Some Utility Capacity in Place" (identified in green on Map 3), **capacity exists in at least one major municipal utility (sewer or water).** In each instance, additional capital expenditures are required by the City to service development. The areas designated as having "Some Utility Capacity in Place" could accommodate approximately 24,070 units at 5 units/acre.

The full development of many of these (green) areas, on a sector basis, will require MAJOR transportation expenditures, as described in Report #3 of the Long-Term Growth Management Strategy.

7.3.3 Areas Having "No Utility Capacity In Place"

The third category of lands (identified in blue on Map 3 and Appendix II) includes all of the remaining unsubdivided lands which have been identified through Policy Reports, Area Structure Plans and in the General Municipal Plan, as having a future residential land use. These lands could accommodate approximately 55,840 units at 5 units/acre.

The *full* development of these areas will, in most cases, require major transportation improvements as well.

Combined, the unsubdivided land supply (excluding large areas annexed to the City in 1989), could accommodate an estimated 103,670 single family units at an average density of 5 units per acre.

8. PROBABLE SUPPLY/DEMAND CONDITIONS, BY SECTOR

A key purpose of the Short-Term Growth Management Strategy is to examine, on an annual basis, the expected fit between residential land demand and supply over the coming 5 year period. **The intent is to ensure that there exists a sufficient supply of readily developable land, in a variety of locations, to facilitate competitive land and housing markets.** The comparison of supply and demand is based upon a set of assumptions regarding the level of population growth, the character of housing demand and the expected distribution of that demand among the competing growth corridors. As the market changes, these assumptions can be expected to change as well.

Section 6 of this report provides a basis for estimating the expected market share of single family housing starts in the short-term, although **it is to be recognized that major shifts in activity can and do occur from time to time as a result of individual developers opening-up or completing particular subdivisions.**

Table 11 shows the number and distribution of new single family starts forecasted, by sector, over the 1991 - 1995 period. Table 12 provides the framework through which the annual demand for residential land can be allocated, by sector, and compared to the existing inventory of available building sites and developable land under the "most likely" set of assumptions. (Supplementary information related to the build-out, housing capacity and land supply in each sector is contained in Appendix II).

On the basis of these estimates, the following observations can be made with respect to the supply/ demand conditions in each sector:

1. NORTH

- In reviewing this up-date, it is important to recognize that the North and Northwest sector boundaries have been re-aligned to better reflect the association of the MacEwan and Sandstone communities with the North sector. Moving these areas from the Northwest to the North sector results in changes to the historical market share in each sector. This adjustment should be kept in mind when comparing the observations in this up-date with those presented in the 1988 - 1992 Information Update report.

- The North sector has achieved an average market share of 9% since 1984, with development occurring in the Beddington, MacEwan and Sandstone areas. On average, the sector has added 240 single family units each year. More recently, the sector accounted for 13% of the suburban single family market in the 1988/89 census year, adding 426 units.

- In April, 1990, it was estimated that the MacEwan and Sandstone areas could accommodate roughly 802 single family units on their remaining unsubdivided lands.

- Recent approvals for development in the Crowchild IV Cell A area, (north of Sandstone) can accommodate approximately 365 units, with development commencing in 1990.

- One of the major landowners in the Calgary North area (Harvest Hills) has commenced housing construction (74 units completed or under construction by April 1990) and anticipates capturing a strong market share in 1990.

- As of April 1990, the North sector had a total inventory of 513 vacant R1/R2 lots and 434 acres of unsubdivided land with utility capacity in place, able to accommodate an additional 2,161 units.

- It is expected that the sector's market share will increase from 15 to 17% over the next five year period as the Calgary North area develops a more significant market presence and as the limited serviced land supply in the Northeast begins to constrain development in that sector.

- The existing inventory of serviced land in the North sector should be sufficient to accommodate expected demand to 1993/94. It is expected that utility extensions will be required in 1991/92 to open up additional lands in Crowchild IV-Cell A and/or the Calgary North/Harvest Hills area.

- No transportation constraints exist for the build-out of the existing serviced land inventory in this sector. Because of its proximity to Deerfoot Trail, development in the North sector is desirable in terms of the transportation system.

- The following roadway improvements have been included in the City's five-year capital budget and will assist access to newly developing areas in this sector:

  (1) Beddington Trail (Deerfoot Trail to Country Hills Boulevard - first stage)
  (2) Country Hills Boulevard (Beddington Trail to 14 Street W) - first stage

In addition, the upgrading of Country Hills Boulevard (Deerfoot Trail to Harvest Hills Gate) is under construction and will be completed in 1991.

2. NORTHEAST

- The Northeast sector has achieved an average market share of 12% since 1984, with development occurring in the Martindale, Taradale and Monterey Park areas. On average, the sector, has added 286 single family units each year. More recently, the sector accounted for 14% of the suburban single family market in the 1988/89 census year, adding 732 units.

- It is expected that the sector's overall market share will decline over the next five-year period due to the depletion of serviced land in the Martindale and Taradale areas. Other than the Coral Springs area, no further additions to the serviced land inventory will be made available in the sector until such time as utilities are extended into the Saddleridge area. At present, capital funds are not identified in the City's five year capital spending program to service the Saddleridge area.

- As of April 1990, the Northeast sector had a total inventory of 219 vacant R1/R2 lots and 363 acres of land with utility capacity in place, able to accommodate 2,057 additional units.

- The existing inventory of serviced land in the Northeast sector should be sufficient to accommodate expected demand to 1994/95. As such, additions to the serviced land supply will be needed in 1992/93. The Coral Springs lands provide the best opportunity to increase the sector's supply in the short-term.

- The need to improve McKnight Boulevard from its existing 2 lanes to 4 lanes between 52 St. East and 68 St. East will have to be considered in this sector. Timing for implementation will be dependent on the absorption of lots and growth in traffic volumes due to the development of lots north of McKnight Blvd. (i.e. in Coral Springs).

3. EAST

- The East sector has achieved an average market share of 2% since 1984, with development occurring in the Erin Woods and Applewood Park areas. On average, the sector has added 49 single family units each year. More recently the sector accounted for 3% of the suburban single family market in the 1988/89 census year, adding 93 units. 1990 building permit statistics indicate a slightly greater volume of demand in this sector in the immediate future.

- As of April 1990, the East sector had a total inventory of 176 vacant R1/R2 lots and 227 acres of land with utility capacity in place, able to accommodate 1,225 additional units. This inventory should be sufficient to accommodate demand in the sector through the coming five year period. These lands represent the full inventory of residential land available in the East sector.

- The two major downstream transportation improvements that will improve access to this sector are 50 Avenue S./Ogden Road Interchange and 17 Avenue S. (Deerfoot Trail - Blackfoot Trail). No schedule currently exists for the construction of these projects.

4. SOUTHEAST

- The Southeast sector experienced a substantial market share in 1982/83, as the McKenzie subdivision developed. The sector's share dropped to 4% by 1985/86. Then, with development occurring in Douglasdale, Riverbend and McKenzie, this sector grew to achieve a 18% share in 1988/89 (adding 585 units that year).

- Recent building permit applications (Table 5 and Table 6) suggest that growth in this sector will remain very strong in the short-term.

- As of April 1990, the Southeast sector had a total inventory of 622 vacant R1/R2 lots and 832 acres of land with utility capacity in place, able to accommodate 5,296 additional units.

- The current inventory of serviced land in the sector should be sufficient to accommodate the expected demand to 1995. It is expected that utility extensions will be required in 1993.

- Deerfoot Trail will continue to provide the main traffic artery that will facilitate traffic originating in this sector destined for the downtown and south downtown.

5. SOUTH

- The South sector has maintained a very consistent market share of 12% since 1984, adding 305 units per year on average. More recently, the sector accounted for 12% of the suburban single family market in the 1988/89 census year, adding 395 units.

- With the build-out of Sundance over the next 2 or 3 years, and the start-up of development in Chapparal, it is likely that the sector's market share will decline marginally over the five year period.

- The servicing of Chapparal marks the first time that City utilities will be taken across the Transportation and Utility Corridor. However, in terms of water and sewer services, the Chapparal area is not expected to present any major costs to the City.

- As of April 1990, the South Sector had a total inventory of 57 vacant R1/R2 lots and 515 acres of land with utility capacity in place, able to accommodate 2,777 additional units.

- The existing inventory of serviced land in this sector should be sufficient to accommodate expected demand to 1995. In addition, land recently annexed adjacent to the Chapparal area could be developed without requiring major City expenditures for utility extensions.

- In order to maintain an acceptable level of service for the transportation system as the population south of Fish Creek increases from 15,000 - 27,000, grade-separated interchanges on Macleod Trail at Anderson Road and Canyon Meadows Drive, and the LRT extension to Midnapore were identified in the South Calgary Transportation Study. Of these projects, only the Macleod Trail/Anderson Road Interchange has been identified as a priority in the 1990 TIPS Update and budgeted for construction within the next five years. As such, increased delays can be expected for traffic crossing Fish Creek as the sector builds out.

6. SOUTHWEST

- The Southwest sector has achieved a substantial market share of 20% since 1984, adding 500 units per year on average.

- This share has been reduced significantly with the build-out of Woodbine, Canyon Meadows and the Woodlands area. In the 1988/89 census year, the sector accounted for 16% of the suburban single family market, adding 529 units.

- Recent building permit applications suggest that the sector will account for approximately 17% of the market in 1990, and it is expected that this share will decline marginally over the next five year period.

- As of April 1990, the Southwest Sector had a total inventory of 401 vacant R1/R2 lots and 320 acres of land with utility capacity in place, able to accommodate an additional 1,637 units.

- The existing inventory of serviced land should be sufficient to accommodate expected demand to 1992/93. It is expected that utility extensions will be required in 1991.

- Transportation constraints for this sector are the same as those stated for the South Sector. In addition, construction of the Sarcee Trail South extension (Glenmore Trail to Highway 22X) is planned to support future development in the sector.

7. WEST

- The West sector, like the South sector, has held a very consistent market share since 1984 (averaging 9% or 220 units/year).

- A review of recent single-family building permit applications indicates that the sector accounted for 9% of applications in 1989 (465 units) and 13% of applications during the first eight months of 1990 (406 units).

- As of April 1990, the West Sector had a total inventory of 611 vacant R1/R2 lots and 215 acres of land with utility capacity in place, able to accommodate an additional 1,033 units.

- Within the Signal Hill and Strathcona Cell H areas, the "partially serviced" land supply is capable of accommodating approximately 1,675 additional units, once further utility extensions are undertaken, (refer to Section 9). The only remaining developable lands of significance are in the Winter heights/Stonebridge and Patterson Heights areas.

- The West sector has demonstrated a strong and consistent market share (8% - 10%) for the past five years and can be expected to experience similar or increased demand over the next five year period. However, the approaching shortage of developable land in the sector, as noted above, can only be addressed through annexation west of the Strathcona area and points to a clear need to pursue annexation (west of Strathcona) as soon as possible.

- Faced with some uncertainty as to the expected timing of annexation west of Strathcona, it seems only prudent at this point in time to assign a declining market share in the sector to 1995 and increase the share in other sectors accordingly. This is done on the basis that without annexation, the existing limited land supply will only be able to accommodate a portion of the demand for housing in this area. Should annexation proceed, it is reasonable to expect that the increased availability of new development sites would result in a sustained share or, more likely, an increased market share subsequent to annexation.

- Based on the above, the existing inventory of serviced land should be sufficient to accommodate expected demand to 1992/93. It is expected that utility extensions will be required in 1991.

- 17 Avenue S.W. has been upgraded west of Sarcee Trail and, together with the proposed realignment of Highway 8, will facilitate continued development in the sector.

8. NORTHWEST

- The Northwest has been the strongest growth corridor in the 1980's, averaging a 25% market share and 623 units per year since 1984. More recently, the market share for the sector has declined somewhat, to 20% in the 1988/89 census year, adding 654 units.

- Although recent building permit applications tend to indicate further market share declines, it is expected that activity in the sector will remain relatively strong over the forecast period, averaging 19 to 21% of the total suburban single family market.

- As of April 1990, the northwest sector had a total inventory of 651 vacant R1/R2 lots and 1,607 acres of land with utility capacity in place, able to accommodate an additional 7,577 units.

- The existing inventory of serviced land should be sufficient to accommodate expected demand throughout the forecast period (to 1995). It is not expected that utility extension will be required prior to 1995. However, the development of some portions of the serviced land supply may be restricted until additional road access is provided (e.g. through extensions to Sarcee Trail, Shaganappi Trail and/or Country Hills Boulevard). As such, either additional roadway capacity may have to be constructed prior to 1995, or alternatively, service extensions could be considered to allow development in areas where access is not a concern.

- A number of projects identified as priorities in the 1990 TIPS update for north and northwest Calgary will ultimately provide an alternate east-west route for traffic from the developing areas (primarily Crowchild III) that are currently using the Crowchild Trail and Shaganappi Trail corridors. These projects include:

  - Deerfoot Trail/Beddington Trail interchange;

  - Beddington Trail and Country Hills Boulevard (from 14 Street West to Deerfoot Trail); and

  - Country Hills Boulevard and Shaganappi Trail (from 14 Street West to Edgemont Boulevard.

  The full development of East Scenic Acres may be constrained by the 25,000 vpd environmental capacity established for the 85 Street bridge.

9. SERVICING IMPLICATIONS

9.1 THE NEED FOR UTILITY EXTENSIONS

The serviceable residential land supply, that is, the existing inventory of vacant R1/R2 lots and the unsubdivided areas with "Utility Capacity in Place" (the red areas on Map 3), together provide enough capacity for an estimated 27,000 units (or 81,000 people at an average density of 3.0 people/unit). **These lands could provide a sufficient inventory to accommodate expected demand through 1994, in terms of the total land requirement on a city-wide basis. Utility extensions to increase the supply of serviced land will therefore be required before 1995 to meet expected demand in a City-wide basis. In addition, there are likely to be serviced land shortages in particular sectors by 1993, and these will require the extension of city utilities.**

The timing of utility extensions is to be reviewed in the context of the policies contained in Council's Short-term Growth Management Strategy (approved in February, 1988). The following specific policies provide the basis for this review:

1. The City will endeavour to accommodate growth while at the same time attempting to avoid premature investment in municipal infrastructure.

2. Through the normal budgeting process, decisions on capital expenditures relating to the extension and/or upgrading of municipal water, storm, sanitary and transportation systems, or increases in electric sub-station capacity, will be made after consideration has been given to:

   - the overall capital cost implications of the extensions, including the cost of the other services the City provides in addition to those listed;
   - an understanding of the municipality's financial capability;
   - existing market conditions and anticipated demand as they relate to the proposed expenditure; and
   - consideration of the impact of these decisions on the provision of gas, telephone and cable services.

3. The City will make every effort to build sufficient planning, budgeting and design lead times into the normal planning and budgeting process to allow the City to be in a position to construct the municipal infrastructure necessary to provide the supply of serviced land determined to be necessary under policy #2.

On the basis of the forecasts and allocations contained in this report, and if a reasonable float of lands with "Utility Capacity in Place" is to be maintained in each sector, the City should be prepared to undertake or facilitate utility extensions in each sector in the years shown below, and so ensure that serviced land shortages do not occur:

		PROBABLE YEAR FOR COMMENCING CONSTRUCTION OF UTILITY EXTENSIONS	UTILITY REQUIRED
1.	NORTH	1991-1992	water and possibly sanitary*
2.	NORTHEAST	1992-1993	stormwater management
3.	EAST	none expected	
4.	SOUTHEAST	1993	storm and sanitary
5.	SOUTH	1994	storm and sanitary
6.	SOUTHWEST	1991	sanitary
7.	WEST	1991	storm
8.	NORTHWEST	after 1995	

*Two alternative areas exist in this sector for which utility extensions could be undertaken.

Within the 5 year time frame, and notwithstanding the availability of municipal services in some sectors, there are expected to be increasing demands placed on the City to extend utilities and transportation services into areas currently having incomplete or no utility capacity in place.

9.2 IMPLICATIONS OF THE "SERVICEABLE" LAND SUPPLY

In dealing with shortages in a particular sector, Council may or may not choose to expend funds to service new lands, given the availability of serviced land in other sectors. In considering such a choice, the following implications should be taken into account.

Limiting development to those lands having utility capacity currently in place may not satisfy all of the requirements of the marketplace with respect to:

- providing a sufficient number of locational choices for each market segment;
- providing a readily developable supply in each sector (if particular landowners choose not to develop or sell their lands within the 5 year period);
- providing the blend of desired locations and marketable amenities to service particular market segments in each sector;
- allowing individual landowners the flexibility to bring their lands on-stream when they wish, if the development of their lands requires major City expenditures (i.e. if their lands are within a partially-serviced or unserviced area).

In addition, there may be other factors which influence the need for or timing of service extensions in particular areas, and which are not strictly related to local demands for residential land. For example, specific service extensions may also satisfy demands for non-residential uses, such as industrial development, or resolve existing servicing problems in the sector.

On the other hand, the development of those areas shown to have major utility capacity in place offers several benefits, including:

- minimizing the assumption of new debt by the City in accommodating growth in the short-term (i.e. not contributing to an increase in the existing debt/capita ratio);

- reducing the need to increase the City's operating budget to retire new debt;

- expediting the cash recoveries for those acreage assessment expenditures already undertaken in fully-serviced areas. Where there is only a fixed amount of new residential construction each year, development occurring on land requiring additional municipal services will delay the full development of existing serviced areas and extend the cost-recovery period for past City expenditures on acreage assessment infrastructure; and

- maintaining current acreage assessment charges at manageable levels by minimizing the accruing interest which subsequent developments must finance over the extended time frame.

It is within the context of what are, at times, divergent interests (as noted above) that the City's growth management processes must:

- provide a context for setting the budgeting priorities of each service department in relation to a shared view of the development pattern expected to emerge over the coming 5 year period; and

- provide current information upon which Council can respond to the requests of individual landowners situated beyond the fully-serviced areas as they seek to satisfy the diverse segments of the housing market, as they interpret them.

The Short-Term Growth Management Strategy provides mechanisms through which Council can give balance and perspective to these varying interests in a consistent and rigorous way. In addition to providing ongoing support to the City's capital budgeting process, this Strategy has also served as the basis for a number of recent cost-sharing agreements on the extension of services into new areas. Specifically, cost-sharing arrangements between the City and area developers have been put in place for:

- Strathcona Cell H (sanitary and storm services);

- Harvest Hills (transportation improvements);

- Crowchild IV/the Hamptons (transportation improvements).

9.3 SERVICING IMPLICATIONS, BY SECTOR

This section briefly describes the major **utility servicing requirements** in the areas identified as having "Some Utility Capacity in Place" in each sector. It also identifies, on a sector by sector basis, the major transportation infrastructure that may be required (in addition to those improvements currently budgeted) to service the full development of the areas having "Some Utility Capacity in Place".

North Sector

- Calgary North/Harvest Hills:
  - Development of the "green" area South of 112 Avenue is restricted until completion of a second water feed extension from Beddington Heights, the Beddington water reservoir and North Hill pump station.
- Crowchild IV Cell A:
  - Development of the "green" area is restricted until completion of the Beddington Creek Phase II sanitary trunk and completion of the water service projects identified for the Calgary North/Harvest Hills area.
  - The developers will be responsible for construction of the storm sewer system required to service this area.
- There are no major transportation constraints expected in the Calgary North/Harvest Hills area. This is a desirable direction for growth in terms of the transportation system. The build out of lands in Crowchild IV Cell A may be constrained by the timing of construction of Beddington Trail.

Northeast Sector

- Coral Springs:
  - Requires resolution of the stormwater management system (or systems) or a commitment by the developer that there will be no cost to the City for land or construction of the storm system.
- McKnight Boulevard (52 Street E. - 68 Street E.) may require upgrading to 4 lanes.

East Sector

- No "green" areas exist.

Southeast Sector

- McKenzie Lake:
  - Development of the "green" area south of Douglasdale is restricted until the sanitary and storm sewer trunk extensions needed to serve the area are constructed.

South Sector

- No "green" areas exist.

Southwest Sector

- Development of the "green" area is restricted until issues related to sanitary and storm sewer servicing are resolved, namely:

  i) for those portions of the area south of 162 Ave. the technical design of the storm sewer system, as well as the method of financing the construction of the storm sewer system, have yet to be resolved.

  ii) for the area north of 162 Ave., and west of 14 Street, an extension to the 162 Ave. sanitary trunk is required in order to provide sanitary sewer servicing. In addition, a new water feedermain will be constructed as development proceeds.

- Full development may require the grade-separation of Macleod Trail at Canyon Meadows Drive and the extension of Sarcee Trail from Glenmore Trail to Highway 22X.

West Sector

- Signal Hill and Strathcona Cell H:

  - Development of the "green" area is restricted until the construction of storm and sanitary sewer extensions.

- Winter Heights (Stonebridge):

  - Development of the "green" area may be restricted until an additional water main extension is constructed. Development will also require the construction a new storm sewer outfall to the Bow River and the extension of sanitary sewers by the developer.

- Patterson Heights:

  - Development will require the construction of a new storm sewer outfall to the Bow River and the extension of sanitary sewers by the developer.

- No major transportation facilities will need to be budgeted for by the City to service development in the sector. It is the responsibility of developers in the Strathcona Cell H area to realign Highway 8 to the 50 Avenue South right-of-way when development exceeds 700 units.

Northwest Sector

- Crowchild IV Cells B & C:

  - Require resolution of the stormwater management drainage systems.

  - Portions of Cell B and C require an extension of the Beddington Creek Phase II sanitary sewer trunk.

  - The western portion of Cell C requires an extension of the 81 Street storm sewer system.

- Crowchild III Cell D:
  - Requires extension of the 81 Street storm sewer system.
- Valley Ridge:
  - Stormwater management drainage area requirements need to be resolved.
  - A watermain extension is required from the Bearspaw Water Treatment Plan. The Bow River crossing component of this main has been included in the provisional 1991 capital budget.
  - Extension of the Bearspaw sanitary trunk is required on the north side of the Bow River.
- Greenbriar:
  - Requires an extension of the Bowness storm sewer acreage assessment trunk and an extension of the watermain from 83 Street N.W.
- The following transportation facilities will be required to service the full development of the Crowchild IV lands:
  - Northwest LRT Extension (Brentwood - 53 Street),
  - Beddington Trail
  - Country Hills Boulevard (Shaganappi Trail to Beddington Trail)
  - Shaganappi Trail Extension
  - Sarcee Trail Extension

  Of these facilities, first-stage extensions to Beddington Trail and Sarcee Trail have now been included in the City's five-year capital program.
- The up-grading of Nose Hill Drive is a developer responsibility and will provide a means of access to lands Crowchild IV Cell C and Crowchild III Cell D.

10. CONCLUSIONS

The information presented in this report reflects a view of the immediate and five year residential land situation in Calgary, as it appears at this point in time. A key purpose of this report is to examine the expected fit between residential land demand and supply over the coming five year period. The intent is to ensure that these exists a sufficient supply of readily developable land, in a variety of locations, to facilitate competitive land and housing markets, while avoiding premature municipal investment in utilities and services. It is fully recognized that supply and demand conditions are in a constant state of flux and that it is important to monitor changes on an ongoing basis and to undertake a similar review of circumstances annually.

On the basis of the analysis presented in this report, the Directors' Growth Management Steering Committee wishes to put forward the following conclusions for Council's information:

1. Calgary appears to be entering a period of sustained economic growth that may result in a population growth of 17,500 -19,000 people/year;

2. This growth may generate a demand for 4,200 new single family units in 1991 increasing to 5,200 units in 1995 (most realistic scenario), resulting in an increase of 23,700 new units in total, by 1995.

3. The demand for new housing in suburban areas could utilize an estimated 4,740 acres of land over 5 years (an average of 948 acres/year);

4. There exists a sufficient supply of land with "Utility Capacity in Place" (i.e. with minimal servicing cost to the City) to satisfy this amount of demand on a city-wide basis for the next four years (through 1994), with some cushion of protection should actual growth exceed the projections in the near future. **However, without additional service extensions there will likely be serviced land shortages in particular sectors by 1993.**

   On the basis of the forecasts and allocations contained in this report, and if a reasonable float of lands with "Utility Capacity in Place" is to be maintained in each sector, the City should be prepared to undertake or facilitate utility extensions in each sector in the years shown below, and so ensure that serviced land shortages do not occur:

		PROBABLE YEAR FOR COMMENCING CONSTRUCTION OF UTILITY EXTENSIONS	UTILITY REQUIRED
1.	NORTH	1991-1992	water and possibly sanitary*
2.	NORTHEAST	1992-1993	stormwater management
3.	EAST	none expected	
4.	SOUTHEAST	1993	storm and sanitary
5.	SOUTH	1994	storm and sanitary
6.	SOUTHWEST	1991	sanitary
7.	WEST	1991	storm
8.	NORTHWEST	after 1995	

*Two alternative areas exist in this sector for which utility extensions could be undertaken.

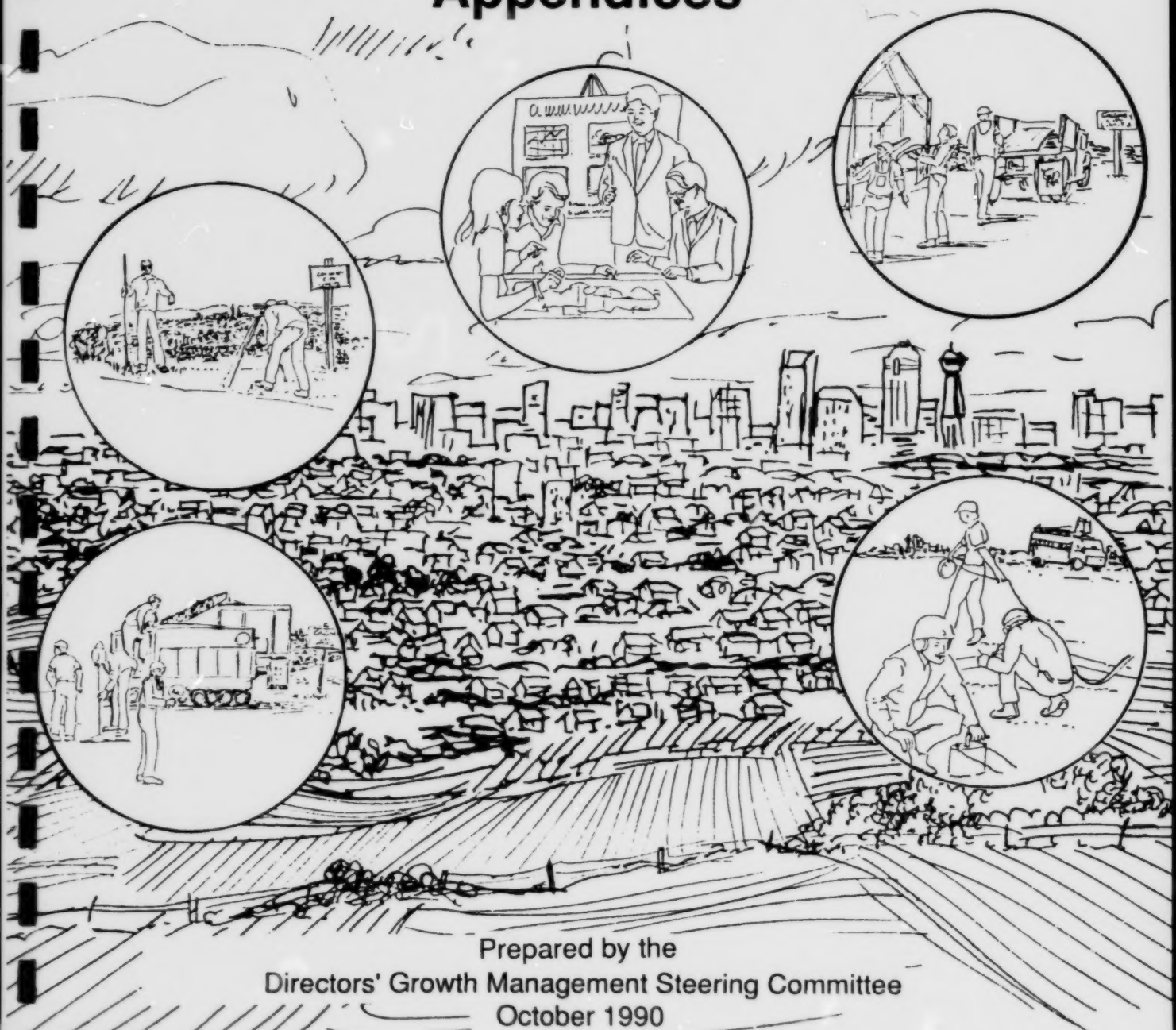
5. In terms of transportation requirements, the road improvements currently included in the City's five year capital budget forecast should be sufficient to provide access to most areas with utility capacity now in place (refer to Sections 8 and 9). However, with additional areas opening up for development and the overall growth of the city, the level of service of the transportation system will be reduced without additional expenditures beyond those in the City's current budget envelope.

6. **Notwithstanding the above, the City should also anticipate requests from individual developers to service lands which do not, at present, have utility capacity in place.** Council's Short-Term Growth Management Strategy provides an effective process in which these requests can be evaluated on their own merits and brought forward to Council for consideration.

Short -Term Growth Management Strategy

Information Update 1991-1995

Appendices



Prepared by the
Directors' Growth Management Steering Committee
October 1990

THE CITY OF CALGARY
PLANNING & BUILDING DEPARTMENT

SHORT-TERM GROWTH MANAGEMENT STRATEGY

INFORMATION UPDATE 1991-1995

APPENDICES

Prepared by the
GROWTH MANAGEMENT TECHNICAL COMMITTEE
for the
DIRECTORS' GROWTH MANAGEMENT STEERING COMMITTEE

OCTOBER 1990

PUBLISHING INFORMATION

TITLE:	SHORT-TERM GROWTH MANAGEMENT STRATEGY INFORMATION UPDATE 1991-1995 APPENDICES
AUTHOR:	DIRECTOR'S GROWTH MANAGEMENT STEERING COMMITTEE
STATUS:	AVAILABLE FOR INFORMATION PURPOSES
PRINTING DATE:	OCTOBER, 1990
ADDITIONAL COPIES:	THE CITY OF CALGARY PLANNING INFORMATION CENTRE P.O. BOX 2100, POSTAL STATION 'M' CALGARY, ALBERTA T2P 2M5 (403) 268-5333

COMMENTS:THIS INFORMATION UPDATE WAS PREPARED BY AN INTER-DEPARTMENTAL COMMITTEE. ENQUIRIES AND COMMENTS SHOULD BE ADDRESSED TO THE CHAIRMAN, GROWTH MANAGEMENT TECHNICAL COMMITTEE, IN THE PLANNING & BUILDING DEPARTMENT (268-5331)

APPENDIX I

TABLES, FIGURES AND MAPS

LIST OF TABLES:

TABLE 1: Short-Term Population Projections for Calgary, 1990 - 1995

TABLE 2: Forecasted Population and Housing Growth, 1990 - 1995

TABLE 3: Single Family Housing Starts and Vacancies, Actual (1979 - 1989) and Forecasted (1990 - 1995)

TABLE 4: Market Share Distribution of New Suburban Housing, By Sector, 1985 - 1989 (Single Family Units Only)

TABLE 5: Number of Residential Units for Which Building Permits Were Applied for in 1989

TABLE 6: Number of Residential Units for Which Building Permits Were Applied For From January 01 - August 31, 1990

TABLE 7: Location of Developer Requests for Utility Installations in 1990

TABLE 8: Estimated Supply of Approved R1 and R2 Lots in Suburban Areas, By Sector, as of April, 1990

TABLE 9: Distribution of Serviced (With Shallow Utilities) Lots, By Sector, As of December 1989

TABLE 10: Estimated Supply of Unsubdivided Residential Land, By Sector, as of April, 1990

TABLE 11: Short-Term Estimates of Housing Demand and Allocation, by Sector, 1991 - 1990

TABLE 12: Estimates of Unsubdivided Land Supply and Demand Conditions, By Sector, 1991 - 1995

LIST OF FIGURES

FIGURE 1: Annual Net Migration for Calgary, Actual and Forecasted

FIGURE 2: Recent and Forecasted Population Growth for Calgary

FIGURE 3: Annual Population Growth, Actual and Forecasted

FIGURE 4: Single Family Housing Starts, Actual and Forecasted

FIGURE 5: Change in Single Family Vacancy Rates, 1978 - 1990

FIGURE 6: Gross Residential Acres Subdivided, 1974 - 1989

FIGURE 7: Market Share of New Single Family Units, By Sector, 1985- 1989

FIGURE 8: Market Share of New Single Family Units, By Sector, 1989

FIGURE 9: Market Share of Single Family Building Permit Applications, By Sector, 1989

FIGURE 10: Market Share of Single Family Building Permit Applications, By Sector, January 1 to August 31, 1990

FIGURE 11: Cumulative Single Family Housing Starts, 1988, 1989 and 1990

FIGURE 12: Cumulative Total Housing Starts, 1988, 1989 and 1990

FIGURE 13: Cumulative Single Family Building Permit Applications, 1988, 1989 and 1990

FIGURE 14: 1989 Residential Subdivision, By Sector

FIGURE 15: Acres in Approved Outline Plans, Historical and Expected

FIGURE 16: Lots Approved in Tentative Plans, Historical and Expected

FIGURE 17: Distribution of Approved R1/R2 Lots (Estimated), By Sector, as of April 1990

FIGURE 18: Vacant Suburban Lots With Shallow Utilities in Place, Historical

FIGURE 19: Distribution of the Unsubdivided Residential Land Supply, by Sector, April 1990

FIGURE 20: Distribution of the Unsubdivided Residential Land Supply with Utility Capacity in Place, by Sector, April 1990

LIST OF MAPS

MAP 1: Suburban Sectors

MAP 2: 1990 Developer Survey Results

MAP 3: Unsubdivided Residential Land Supply, City-Wide (April 1990)

SHORT-TERM POPULATION PROJECTIONS FOR CALGARY
1990 - 1995

ASSUMED NET MIGRATION

YEAR	LOW	MEDIUM	HIGH
1990-91	5,500	8,500	11,500
1991-92	6,000	9,000	12,000
1992-93	6,500	9,500	12,500
1993-94	7,000	10,500	13,000
1994-95	7,500	11,000	13,500

PROJECTED POPULATION

YEAR	LOW	MEDIUM	HIGH
1990		693,000	
1991	707,500	710,500	713,500
1992	722,200	728,300	734,400
1993	737,100	746,400	755,600
1994	752,200	765,200	777,200
1995	767,400	784,200	799,000

* All forecasts assume a 1.72 Fertility Rate.

SOURCE: CORPORATE RESOURCES DEPARTMENT
1990 JUNE 01

Table 1

FORCASTED POPULATION AND HOUSING GROWTH
(For Single Family Units Only)
1990 -1995

YEAR	POPULATION	NEW SINGLE FAMILY UNITS	GROSS RESIDENTIAL ACRES REQUIRED @ 6 U.P.A.*	@ 5 U.P.A.*	@ 4 U.P.A.*
1990	693,000	4,400	733	880	1,100
1991	710,500	4,200	700	840	1,050
1992	728,300	4,500	750	900	1,125
1993	746,400	4,800	800	960	1,200
1994	765,200	5,000	833	1,000	1,250
1995	784,200	5,200	867	1,040	1,300
1991-1995	91,200 People added	23,700 Units added	3,950 Acres	4,740 Acres	5,925 Acres

* Units Per Acre gross residential density

SOURCE: Corporate Resources Department
Planning and Building Department
1990 JUNE

Table 2

SINGLE FAMILY HOUSING STARTS AND VACANCIES, 1979 - 1989 (Actual) and 1990 - 1995 (Forecasted)

YEAR	CHANGE IN OCCUPIED UNITS	VACANT SINGLE FAMILY UNITS	SINGLE FAMILY VACANCY RATE %
1978-79	3,181	2,236	2.20
79 - 80	3,913	2,140	2.03
80 - 81	4,772	2,292	2.08
81 - 82	5,517	2,487	2.15
82 - 83	3,081	3,001	2.51
83 - 84	2,584	3,150	2.58
84 - 85	1,800	3,393	2.73
85 - 86	3,586	2,320	1.83
86 - 87	2,585	1,803	1.40
87 - 88	3,006	1,828	1.39
88 - 89	3,092	1,678	1.24
89 - 90*	4,581	1,806	1.29

	YEAR	SINGLE FAMILY STARTS
ACTUAL	1979	5,104
	1980	5,612
	1981	6,948
	1982	3,140
	1983	3,043
	1984	1,751
	1985	2,294
	1986	2,112
	1987	3,005
	1988	3,080
	1989	5,007
FORECAST	1990	4,400
	1991	4,200
	1992	4,500
	1993	4,800
	1994	5,000
	1995	5,200

SOURCE: Corporate Resources Department
C.M.H.C. (Historical single family housing starts)
* - Preliminary 1990 Municipal Census data
OCTOBER 1990

Table 3

MARKET SHARE DISTRIBUTION OF NEW SUBURBAN SINGLE FAMILY HOUSING BY SECTOR, 1984 - 1989

	%'AGE SHARE					84 - 89 AVERAGE SHARE
	84-85	85-86	86-87	87-88	88-89	
NORTH	7	8	9	9	13	9
NORTHEAST	13	8	17	12	11	12
EAST	2	2	0	2	3	2
SOUTHEAST	5	4	13	11	18	10
SOUTH	10	13	11	14	12	12
SOUTHWEST	26	22	21	19	16	21
WEST	8	10	8	10	7	9
NORTHWEST	29	33	22	23	20	25
SUBURBAN TOTAL	100 %	100 %	100 %	100 %	100 %	100 %

SOURCE: Municipal Census
Planning and Building Department
June 1990

Table 4

NUMBER OF RESIDENTIAL UNITS FOR WHICH BUILDING PERMITS WERE APPLIED FOR - (JANUARY 1 - DECEMBER 31, 1989)

SUBURBAN SECTORS	Detached House	TFY Semi-Detached	Semi-Detached House	TFY Up & Down	TOTAL S.F./DUP.	% of Sub's	THS Twnhse.	Apart.	TOTAL UNITS APPLIED FOR	% of Suburbs	% of City Total
North	607	22			629	12%	45		674	11%	10%
%	90%	3%	0%	0%	93%		7%	0%	100%		
Northeast	732		2		734	14%	23		757	13%	12%
%	97%	0%	0%	0%	97%		3%	0%	100%		
East	225	2			227	4%		4	231	4%	4%
%	97%	1%	0%	0%	98%		0%	2%	100%		
Southeast	872				872	17%	61		933	15%	14%
%	93%	0%	0%	0%	93%		7%	0%	100%		
South	489	0			489	9%	30	30	549	9%	9%
%	89%	0%	0%	0%	89%		5%	5%	100%		
Southwest	804	16	8		828	16%	82	30	940	16%	15%
%	86%	2%	1%	0%	88%		9%	3%	100%		
West	465	2	26		493	9%	189	0	682	11%	11%
%	68%	0%	4%	0%	72%		28%	0%	100%		
Northwest	922	4	0		926	18%	86	252	1,264	21%	20%
%	73%	0%	0%	0%	73%		7%	20%	100%		
SUBURBAN TOTAL	5,116	46	36	0	5,198	100%	516	316	6,031	100%	94%
%	85%	1%	1%	0%	86%		9%	5%	100%		
Central Area / Dt.	371	18	2	2	393		17	10	419	-	6%
%	89%	4%	0%	0%	94%		4%	2%	100%		
CITY TOTAL	5,487	64	38	2	5,591		533	326	6,450	-	100%
%	85%	1%	1%	0%	87%		8%	5%	100%		

NOTE: These numbers reflect the number of UNITS applied for in 1989 (6,450 units), and NOT the number of applications (5,590 in 1989). Each multi-unit project has a number of units but only one application.

Table 5

SOURCE: Planning and Building Department, CITY OF CALGARY
03 January 1990

NUMBER OF RESIDENTIAL UNITS FOR WHICH BUILDING PERMITS WERE APPLIED FOR - (JANUARY 1 - AUGUST 31, 1990)

SUBURBAN SECTORS	Detached House	TFV Semi-Detached	Semi-Detached House	TFV Up & Down	TOTAL S.F./DUP.	% of Sub's	THS Townse.	Apart.	TOTAL UNITS APPLIED FOR	% of Suburbs	% of City Total
North	507				507	16%			507	14%	11%
%	100%	0%	0%	0%	100%		0%	0%	100%		
Northeast	290		26		316	10%	23		339	9%	7%
%	86%	0%	8%	0%	93%		7%	0%	100%		
East	178	12			190	6%			190	5%	4%
%	94%	6%	0%	0%	100%		0%	0%	100%		
Southeast	497				497	16%	61		558	15%	12%
%	89%	0%	0%	0%	89%		11%	0%	100%		
South	307				307	10%		30	337	9%	7%
%	91%	0%	0%	0%	91%		0%	9%	100%		
Southwest	543		3		546	17%	16		562	15%	12%
%	97%	0%	1%	0%	97%		3%	0%	100%		
West	358	48			406	13%	350		756	20%	17%
%	47%	6%	0%	0%	54%		46%	0%	100%		
Northwest	430	2			432	13%		54	486	13%	11%
%	88%	0%	0%	0%	89%		0%	11%	100%		
SUBURBAN TOTAL	3,110	62	29	0	3,201	100%	450	84	3,736	100%	82%
%	83%	2%	1%	0%	86%		12%	2%	100%		
Central Area / Dt.	397	20	2	0	419		171	249	838	-	18%
%	47%	2%	0%	0%	50%		20%	30%	100%		
CITY TOTAL	3,507	82	31	0	3,620		621	333	4,574	-	100%
%	77%	2%	1%	0%	79%		14%	7%	100%		

NOTE: These numbers reflect the number of UNITS applied for, (4,574 units), and NOT the number of applications (3,585). Each multi-unit project has a number of units but only one application.

Table 6

SOURCE: Planning and Building Department, CITY OF CALGARY
SEPTEMBER 1990

LOCATION OF DEVELOPER REQUESTS FOR UTILITY INSTALLATIONS IN 1990

SECTOR	HECTARES AFFECTED	ACRES AFFECTED	%	SUBDIVISIONS AFFECTED
NORTH	119.7	296	17%	MacEwan, Country Hills, Sandstone Valley, Harvest Hills, Hidden Valley, Coventry Hills
NORTHEAST	114.0	282	16%	Monterey Park, Martindale, Foxdale, Taradale
EAST	35.0	87	5%	Erinwoods
SOUTHEAST	97.9	242	14%	Riverbend, Douglas Hill, McKenzie Lake, Mountain Park
SOUTH	41.2	102	6%	Sundance, Diamond Cove
SOUTHWEST	90.1	223	13%	Woodpark, Millrise, Shawnee, Millrise Village, Shawnessy, Evergreen
WEST	41.8	103	6%	Christie Park Estates, Signal Hill Strathcona Cell H, Christie Park
NORTHWEST	173.5	429	24%	Edgemont, Hawkstone, Scenic Acre Estates, The Hamptons Scenic Acres, Hawkwood, Arbour Lake, Silver Springs
	713.2	1764	100%	

SOURCE: ENGINEERING DEPARTMENT
1990 MARCH

Table 7

ESTIMATED SUPPLY OF APPROVED R1 AND R2 LOTS IN SUBURBAN AREAS, BY SECTOR, AS OF APRIL 1990

SECTOR	VACANT LOTS	UNDER CONSTRUCTION	TOTAL
NORTH	513	342	855
NORTHEAST	219	206	425
EAST	176	86	262
SOUTHEAST	622	400	1,022
SOUTH	57	192	249
SOUTHWEST	401	303	704
WEST	611	340	951
NORTHWEST	651	601	1,252
TOTAL	3,250	2,470	5,720

* This estimate includes registered lots and lots in approved Tentative Plans which have signed Development Agreements in place.

SOURCE: Planning and Building Department
1990 April

Table 8

DISTRIBUTION OF SERVICED LOTS (WITH SHALLOW UTILITIES) BY SECTOR
NOV 27 - DEC 1, 1989

SECTOR	ORIGINAL NUMBER OF SERVICED LOTS	1988 LOTS BUILT ON	1989 LOTS BUILT ON	EXISTING VACANT SERVICED LOTS	% SHARE OF VACANT LOTS
NORTH	1,129	239	770	359	16%
NORTHEAST	867	71	622	245	11%
EAST	301	161	281	20	1%
SOUTHEAST	1,094	277	829	265	12%
SOUTH	787	237	623	164	7%
SOUTHWEST	1,535	608	1,259	276	12%
WEST	996	241	674	322	14%
NORTHWEST	1,776	407	1,168	608	27%
TOTAL SUBURBS	8,485	2,241	6,226	2,259	100%

SOURCE: C.C.E.S. SHALLOW UTILITY URD LOT SURVEY
AS OF DECEMBER 1, 1989

Table 9

ESTIMATED SUPPLY OF UNSUBDIVIDED RESIDENTIAL LAND,
BY SECTOR, AS OF APRIL 1990
(Shown in Gross Residential Acres)

SECTOR	UTILITY CAPACITY IN PLACE	SOME UTILITY CAPACITY IN PLACE	NO UTILITY CAPACITY IN PLACE	TOTAL ACRES
NORTH	434	1,157	1,706	3,297
NORTHEAST	363	254	1,682	2,299
EAST	227	0	0	227
SOUTHEAST	832	395	5,570	6,797
SOUTH	515	0	0	515
SOUTHWEST	320	1,280	959	2,559
WEST	215	610	0	825
NORTHWEST	1,607	1,019	1245	3,871
TOTAL	4,513	4,715	11,162	20,390 *

* NOTE: This inventory DOES NOT include sites which are presently indentified for multi-family uses in existing Outline Plans. (130 acres).
It also DOES NOT include large areas of unserviced land annexed to the City in July 1989, other than smaller parcels which could serve as logical extensions of existing residential development cells.

SOURCE: Planning and Building Department
1990 June

Table 10

SHORT TERM ESTIMATES OF HOUSING DEMAND AND ALLOCATION, BY SECTOR, SINGLE FAMILY UNITS ONLY, 1990 - 1995

	1990			1991			1992			1993			1994			1995		
ESTIMATED DEMAND		4,400			4,200			4,500			4,800			5,000			5,200	
SECTOR ALLOCATION	%	Units	Acres	%	Units	Acres	%	Units	Acres	%	Units	Acres	%	Units	Acres	%	Units	Acres
NORTH	15%	660	132	15%	630	126	15%	675	135	15%	720	144	16%	800	160	17%	884	177
NORTHEAST	10%	440	88	10%	420	84	9%	405	81	8%	384	77	7%	350	70	6%	312	62
EAST	4%	176	35	3%	126	25	2%	90	18	2%	96	19	2%	100	20	2%	104	21
SOUTHEAST	17%	748	150	17%	714	143	18%	810	162	19%	912	182	19%	950	190	20%	1,040	208
SOUTH	10%	440	88	9%	378	76	11%	495	99	11%	528	106	11%	550	110	11%	572	114
SOUTHWEST	17%	748	150	16%	672	134	16%	720	144	16%	768	154	16%	800	160	15%	780	156
WEST	12%	528	106	11%	462	92	9%	405	81	8%	384	77	8%	400	80	8%	416	83
NORTHWEST	15%	660	132	19%	798	160	20%	900	180	21%	1,008	202	21%	1,050	210	21%	1,092	218
TOTAL	100%	4,400	880	100%	4,200	840	100%	4,500	900	100%	4,800	960	100%	5,000	1,000	100%	5,200	1,040

	TOTAL 1991 - 1995		
ESTIMATED DEMAND	23,700 units		
SECTOR ALLOCATION	Units	Acres	Overall Market Share (%)
NORTH	3,709	742	16%
NORTHEAST	1,871	374	8%
EAST	516	103	2%
SOUTHEAST	4,426	885	19%
SOUTH	2,523	505	11%
SOUTHWEST	3,740	748	16%
WEST	2,067	413	9%
NORTHWEST	4,848	970	20%
TOTAL	23,700	4,740	100%

SOURCE: PLANNING and BUILDING DEPARTMENT
CITY OF CALGARY
OCTOBER 1990

Table 11

ESTIMATES OF UNSUBDIVIDED LAND SUPPLY AND DEMAND CONDITIONS, BY SECTOR
1991 - 1995

SECTOR	1990	DEMAND BY SECTOR (Acres) 1991	1992	1993	1994	1995	TOTAL DEMAND 1991-1995 (acres)	AVAILABLE LAND WITH UTILITY CAPACITY IN PLACE	SURPLUS OR SHORTFALL BY 1995
NORTH	132	126	135	144	160	177	742	434	-308
NORTHEAST	88	84	81	77	70	62	374	363	-11
EAST	35	25	18	19	20	21	103	227	124
SOUTHEAST	150	143	162	182	190	208	885	832	-53
SOUTH	88	76	99	106	110	114	505	515	10
SOUTHWEST	150	134	144	154	160	156	748	320	-428
WEST	106	92	81	77	80	83	413	215	-198
NORTHWEST	132	160	180	202	210	218	970	1607	637
TOTAL	880	840	900	960	1,000	1,040	4,740	4513	-227

SOURCE: PLANNING AND BUILDING DEPARTMENT
CITY OF CALGARY
OCTOBER 1990

Table 12

ANNUAL NET MIGRATION FOR CALGARY,
ACTUAL ('77 – '90) AND FORECASTED ('91 – '95)

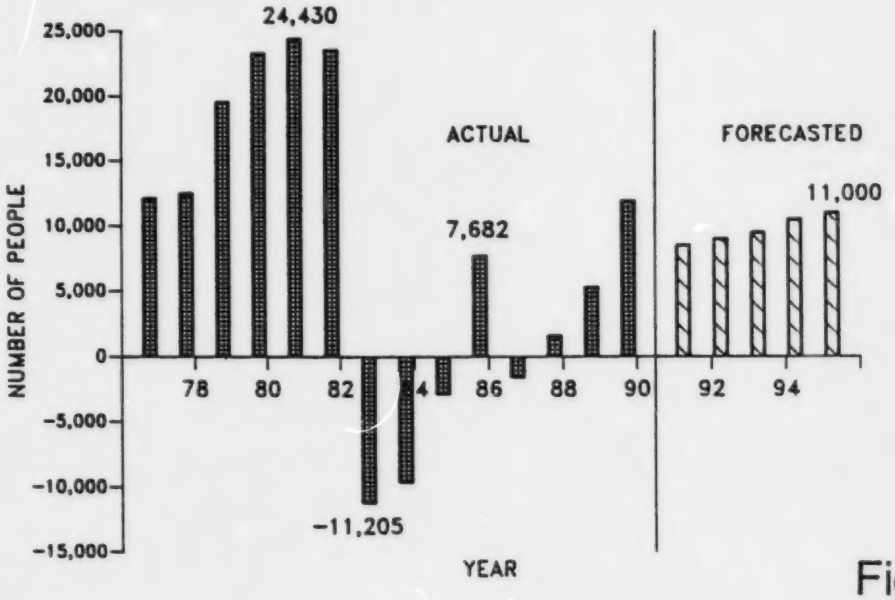


Figure 1

RECENT AND FORECASTED POPULATION GROWTH
FOR CALGARY, 1978 – 1995

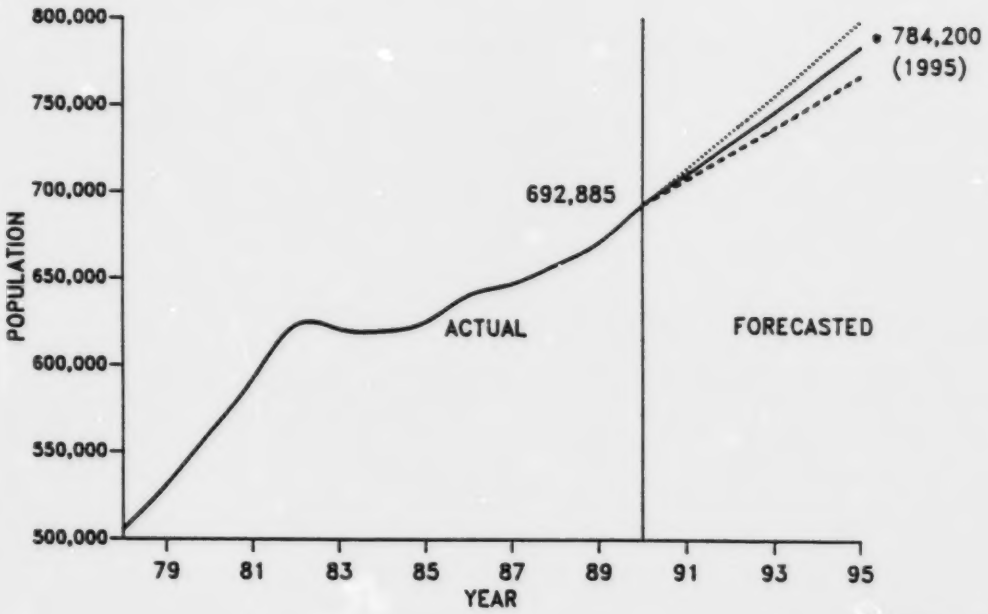


Figure 2

ANNUAL POPULATION GROWTH
ACTUAL (1979–90) and FORECASTED (1991–95)

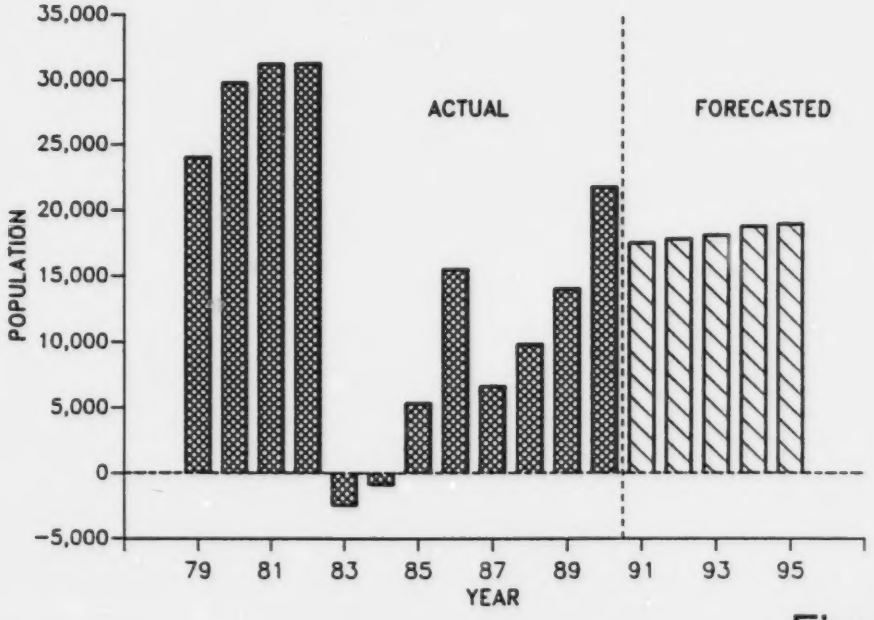


Figure 3

SINGLE FAMILY HOUSING STARTS,
ACTUAL ('79–'89) AND FORECASTED ('90–'95)

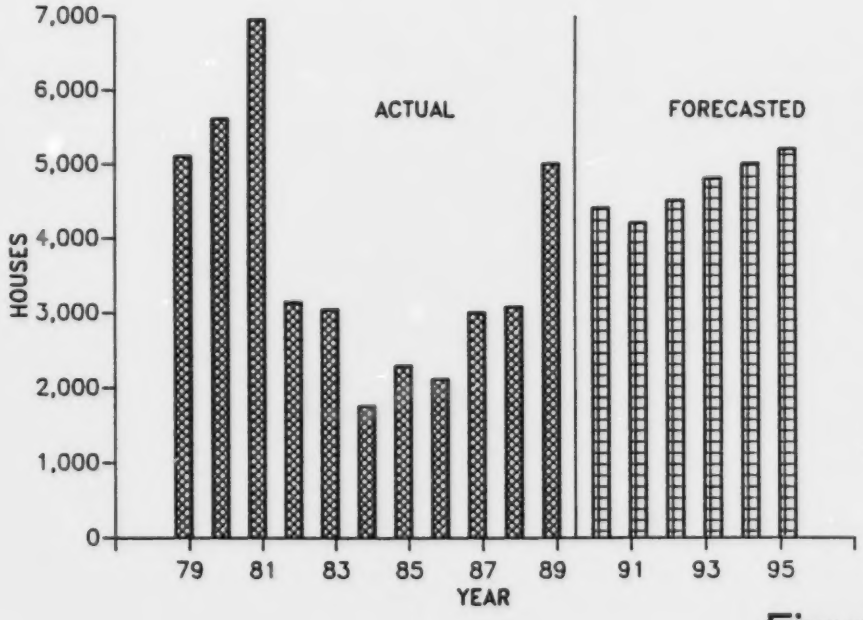


Figure 4

CHANGE IN SINGLE FAMILY VACANCY RATES,
1978 - 1990
(APRIL)

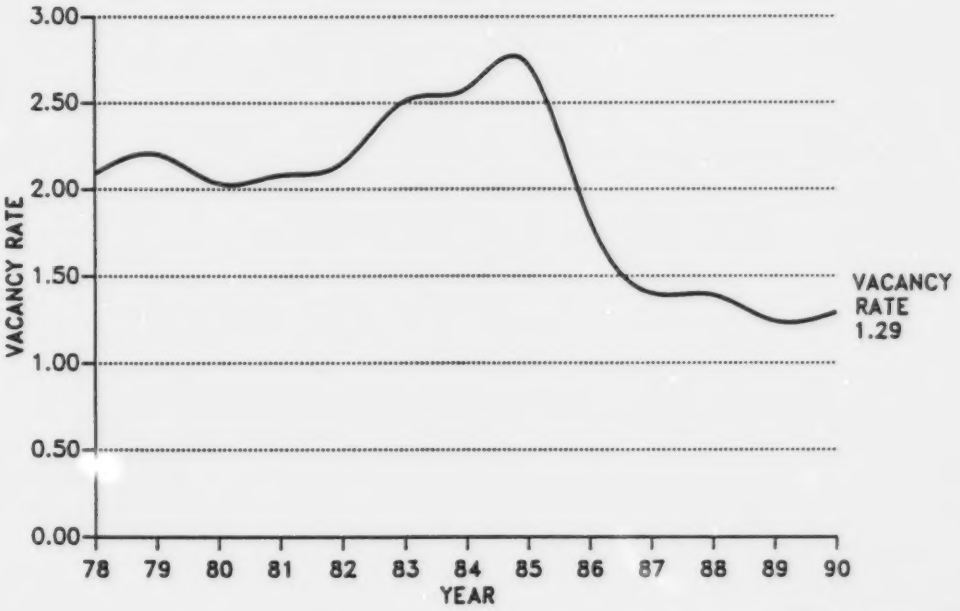


Figure 5

GROSS RESIDENTIAL ACRES SUBDIVIDED,
ACTUAL ('74-'89) AND FORECASTED ('90-'95)

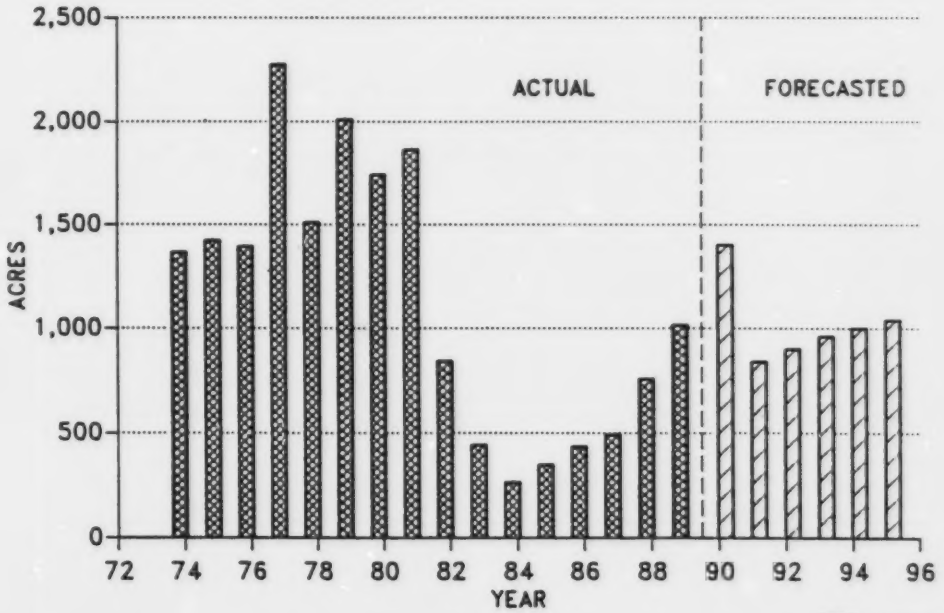


Figure 6

MARKET SHARE OF NEW SINGLE FAMILY UNITS, BY SECTOR
1984 - 1989

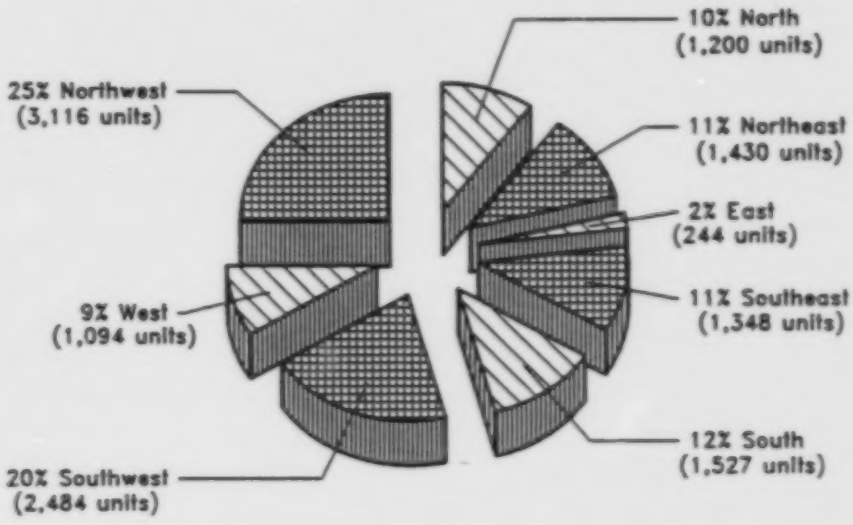


Figure 7

MARKET SHARE OF NEW SINGLE FAMILY UNITS,
BY SECTOR, 1989

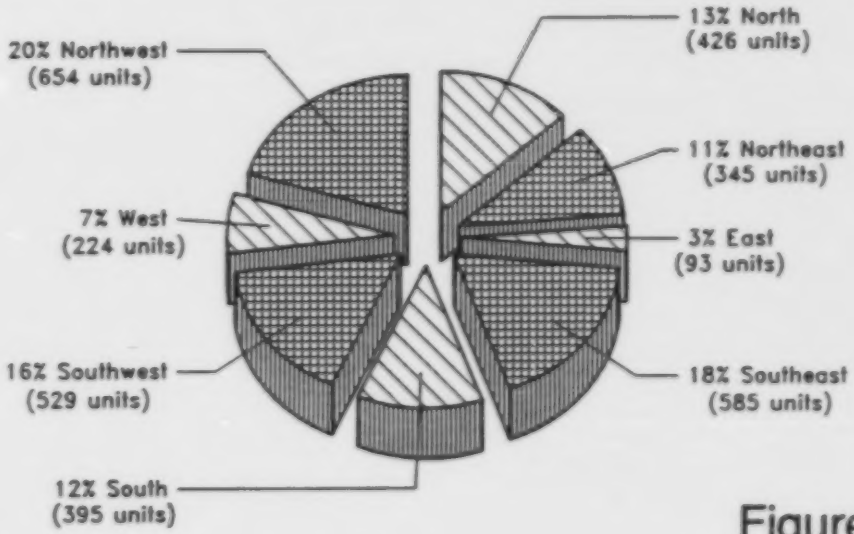


Figure 8

MARKET SHARE OF SINGLE FAMILY BUILDING PERMIT APPLICATIONS,
BY SECTOR, 1989

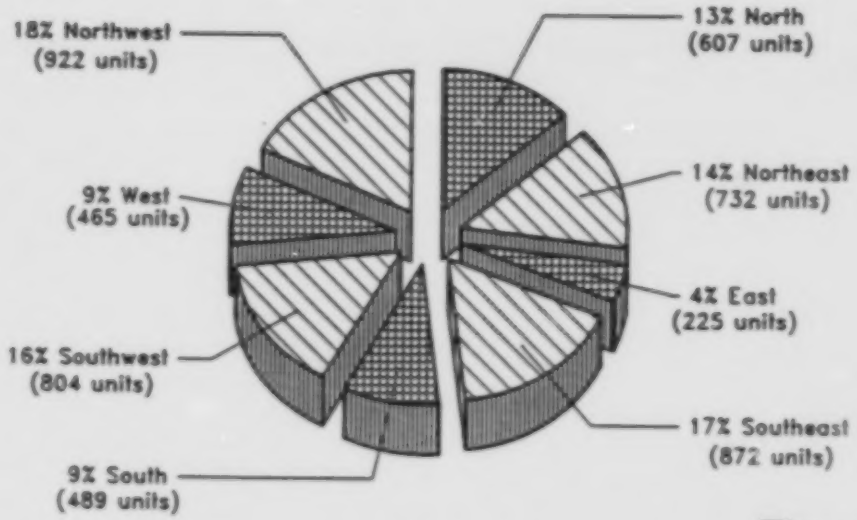


Figure 9

MARKET SHARE OF SINGLE FAMILY BUILDING PERMIT APPLICATIONS,
BY SECTOR, JAN. 1 – AUGUST 31, 1990

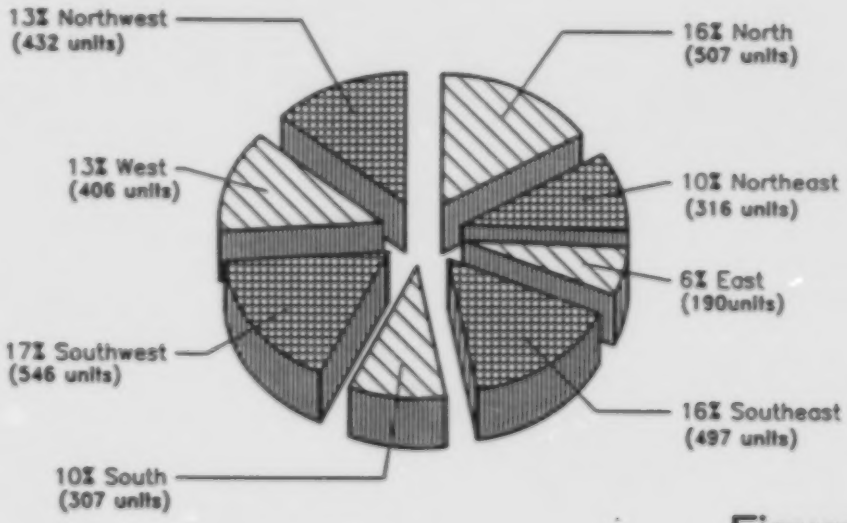


Figure 10

CUMULATIVE
SINGLE FAMILY HOUSING STARTS, BY MONTH
1988, 1989 AND 1990 (January to August)

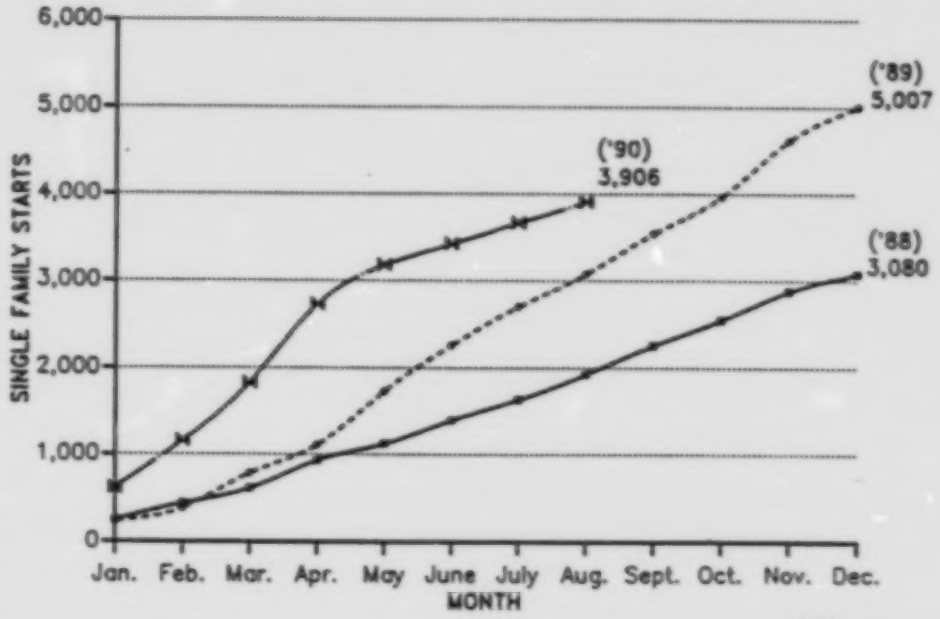


Figure 11

CUMULATIVE
TOTAL HOUSING STARTS, BY MONTH
1988, 1989 AND 1990 (January to August)

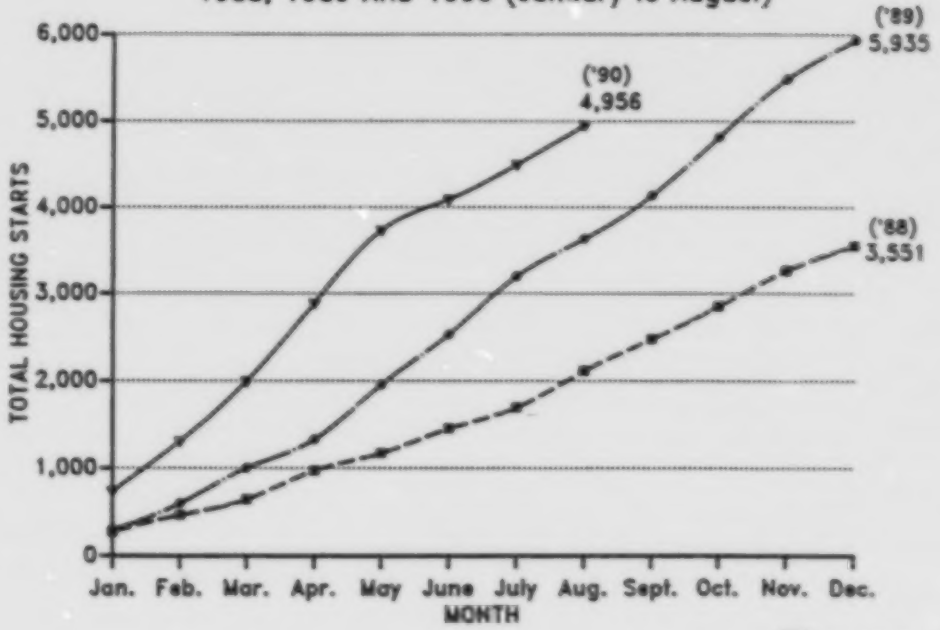


Figure 12

SINGLE FAMILY
BUILDING PERMIT APPLICATIONS
1988, 1989, 1990 (January 1 to August 31)

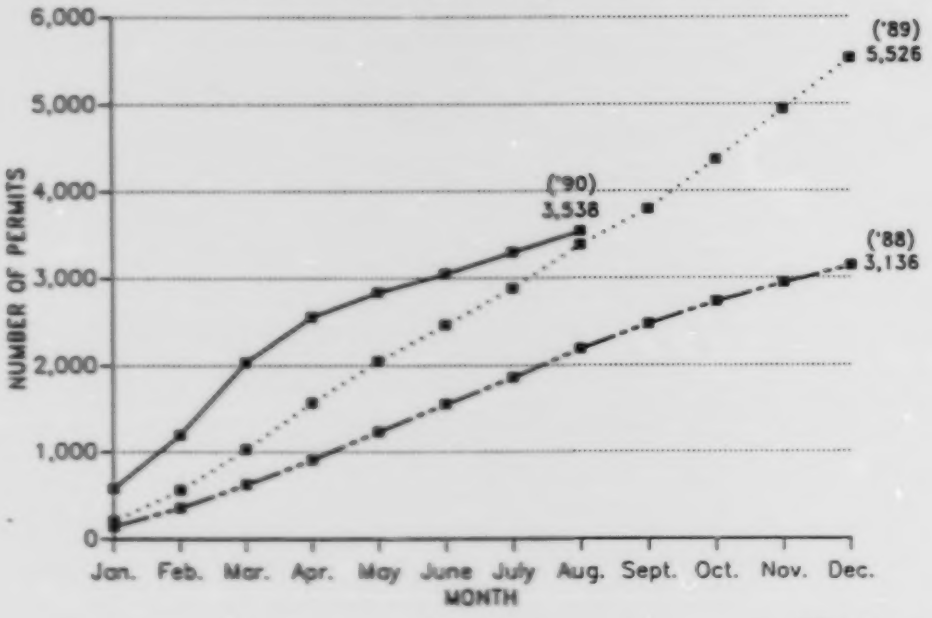


Figure 13

1989 RESIDENTIAL SUBDIVISION
(Gross Residential Acres), BY SECTOR

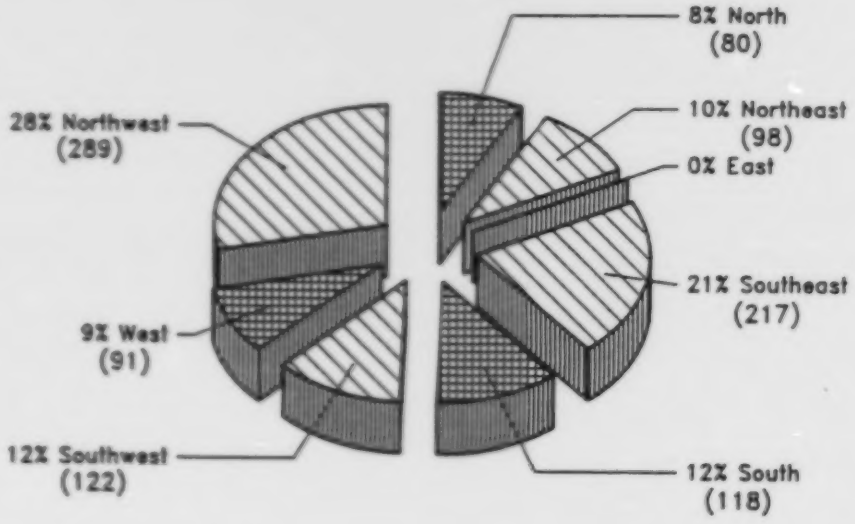


Figure 14

ACRES IN APPROVED OUTLINE PLANS
HISTORICAL (1976–1989) AND EXPECTED (1990)

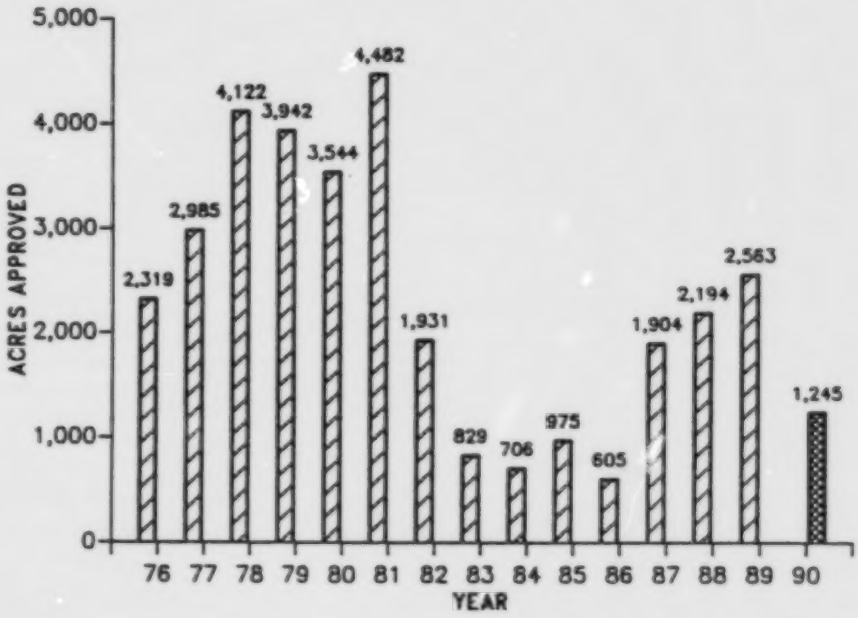


Figure 15

LOTS IN TENTATIVE PLAN APPLICATIONS
HISTORICAL (1977–1989) AND EXPECTED (1990)

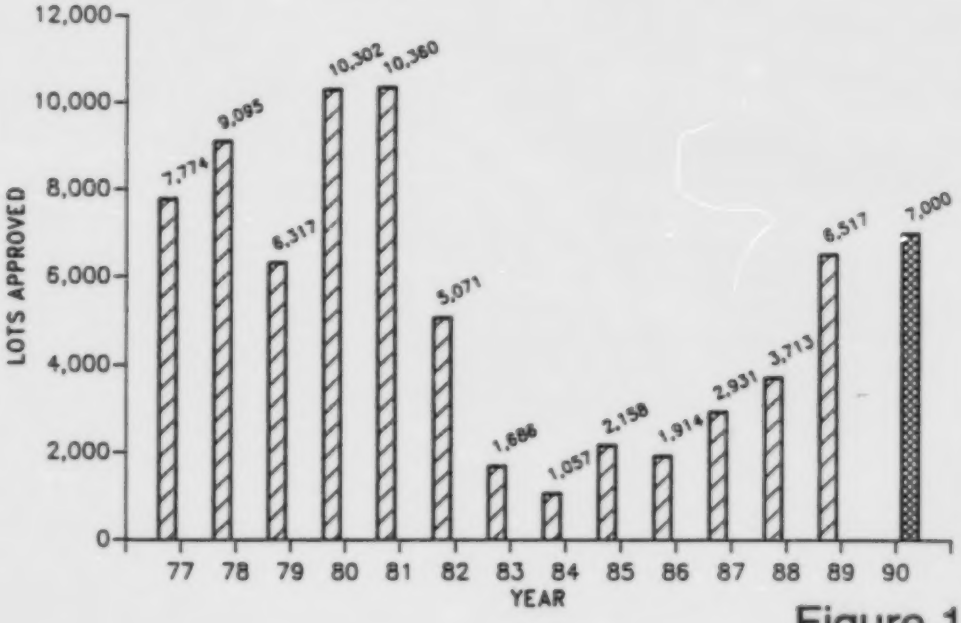


Figure 16

DISTRIBUTION OF APPROVED R1 / R2 LOTS (Estimated),
BY SECTOR, APRIL, 1990

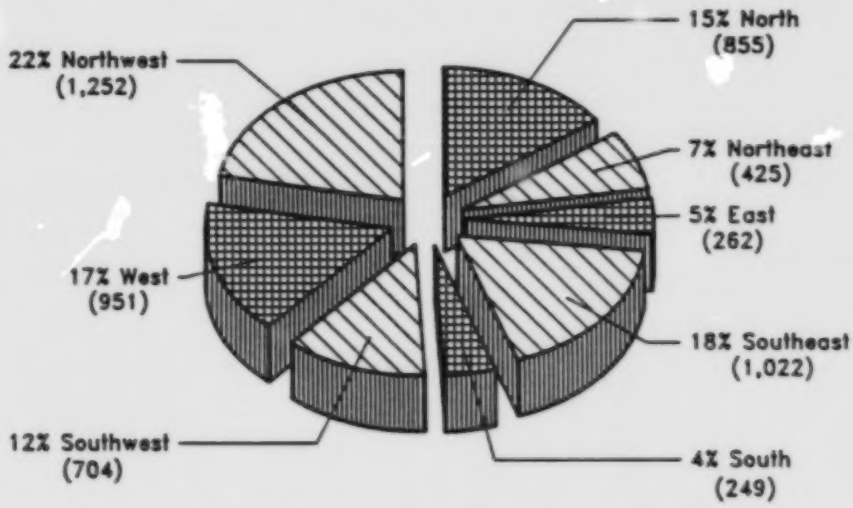


Figure 17

VACANT SUBURBAN LOTS
WITH SHALLOW UTILITIES IN PLACE, HISTORICAL

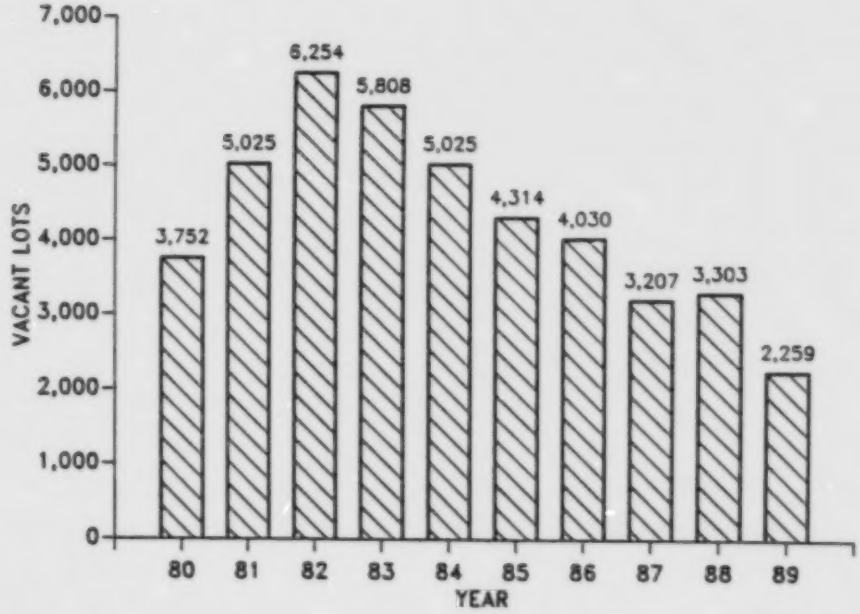


Figure 18

DISTRIBUTION OF THE UNSUBDIVIDED RESIDENTIAL LAND SUPPLY,
BY SECTOR, APRIL, 1990
(ACRES)

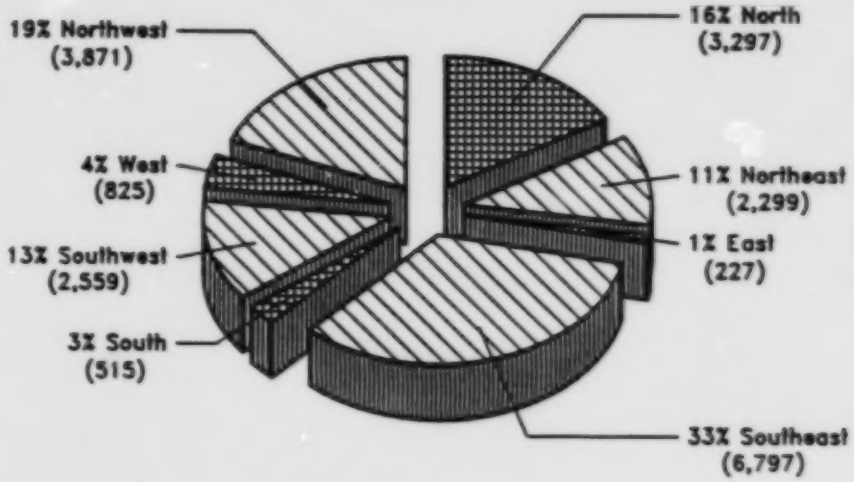


Figure 19

DISTRIBUTION OF THE UNSUBDIVIDED RESIDENTIAL LAND SUPPLY
WITH UTILITY CAPACITY IN PLACE
BY SECTOR, APRIL, 1990
(ACRES)

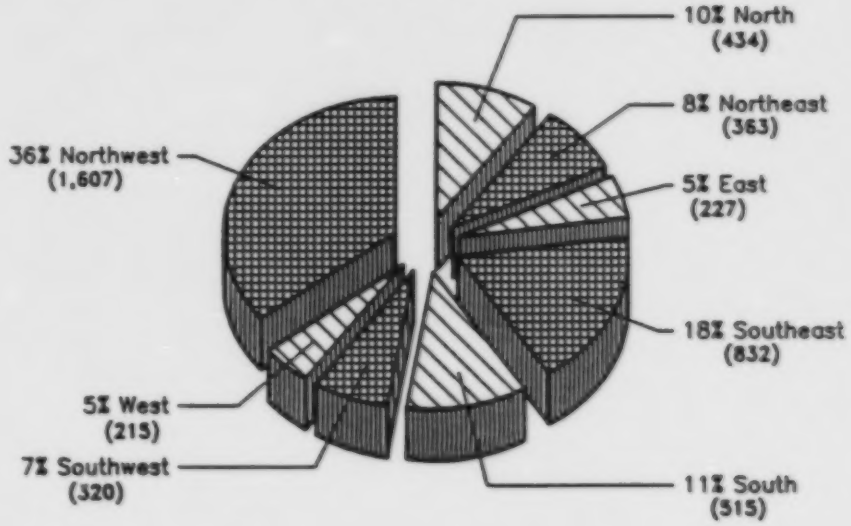
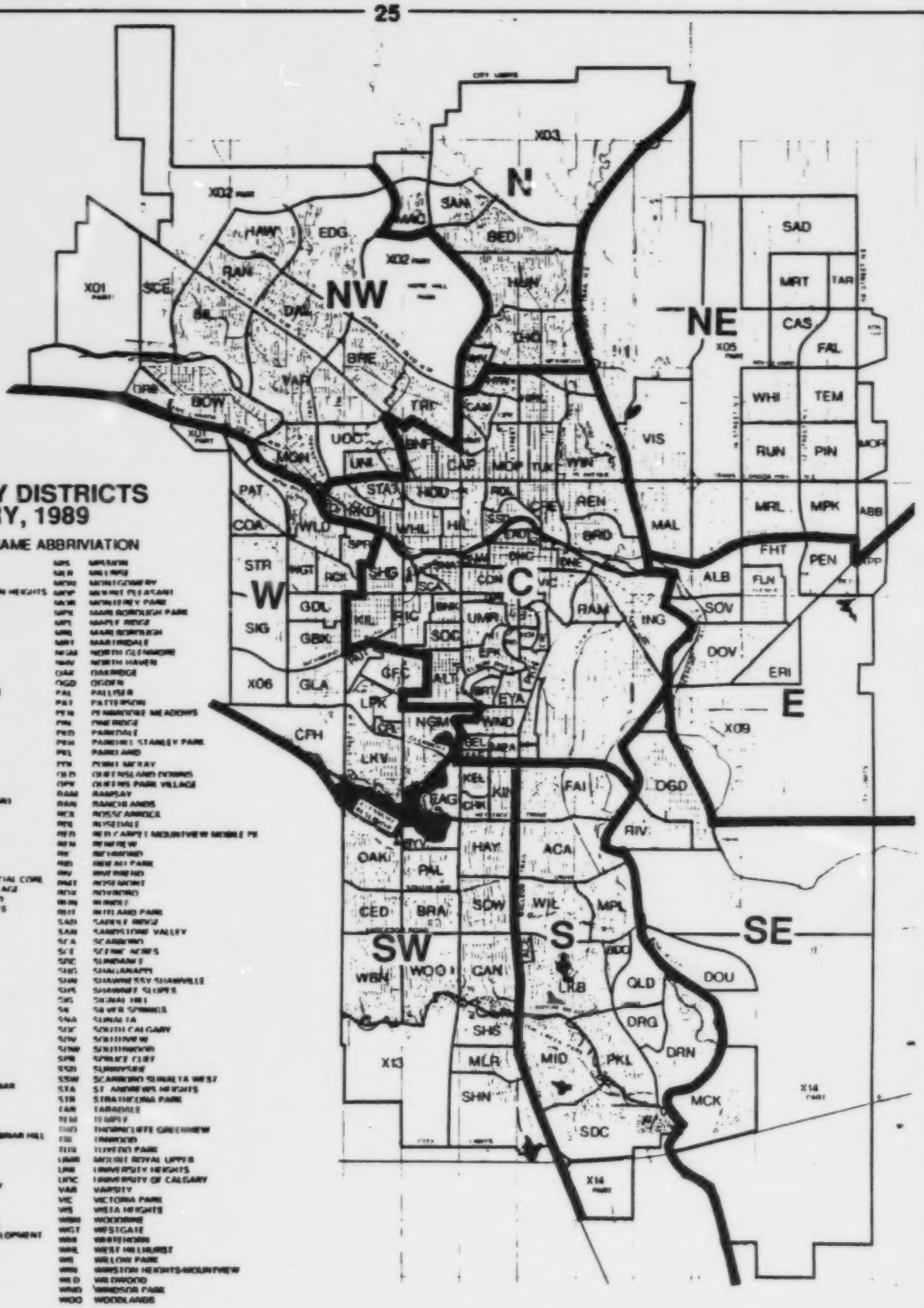


Figure 20



COMMUNITY DISTRICTS OF CALGARY, 1989

ABC	COMMUNITY NAME	ABBRIVIATION
ABB	ABBEYDALE	ABB
ACA	ACADIA	MRV
ACT	ACT	MRW
ALB	ALBERT PARK RADISSON HEIGHTS	MRP
ALT	ALTADORE	MRR
APP	APPLEWOOD PARK	MPK
BDO	BRIDGEPORT	MPL
BED	BEDDINGTON HEIGHTS	MRQ
BEL	BEL AIRE	MRT
BNF	BANFF TRAIL	NCM
BRE	BRENTWOOD	NHV
BRT	BRITANNIA	OAK
BVW	BAYVIEW	OGD
CAM	CAMBRIAN HEIGHTS	PAL
CAN	CANYON MEADOWS	PAT
CAP	CAPITOL HILL	PEN
CAS	CASTLERIDGE	PIN
CED	CEDARBRAE	PKD
CFC	CFB CALGARY	RAM
CFH	CFB HARVEY	RAN
CFL	CFB LINCOLN PARK PMQ	RCK
CHK	CHAPARRAL	RDL
CHW	CHINATOWN	REN
CLI	CLIFF BUNGALOW	RIC
COA	COACH HILL	RIV
CON	CONNAUGHT	ROX
CRE	CRESCENT HEIGHTS	RVE
DAL	DALHOUSIE	RVW
DNC	DOWNTOWN COMMERCIAL CORE	SAD
DNE	DOWNTOWN EAST VILLAGE	SAN
DNW	DOWNTOWN WEST END	SCA
DOV	DOVERGLASDALE ESTATES	SCE
DRG	DERG	SCR
DRN	DEER RIDGE	SDC
DRR	DEER RUN	SGY
EAG	EAGLE RIDGE	SHG
EAU	EAU CLAIRE	SHN
ERI	ERLTON	SHS
ERL	ELBOW PARK	SIG
ERN	ERIN WOODS	SKD
ERL	ERLTON	SOC
EVA	EVANSTON	SOW
FAI	FAIRVIEW	SPR
FAL	FALCONRIDGE	SSW
FHT	FOREST HEIGHTS	STA
FLN	FOREST LAWN	STR
GAR	GARRISON	SUN
GEN	GLENDALE	SVW
GLA	GLAMORGAN	SWW
GRV	GREENWOOD GREENBRIAR	TAR
HAW	HAWKWOOD	TEM
HAY	HAYSBORO	TUX
HIL	HILLHURST	UMR
HRW	HIGHWOOD	UNI
HRW	HERITAGE HEIGHTS BRIAR HILL	VAL
HPK	HIGHLAND PARK	VAR
HUN	HUNTINGTON HILLS	VIC
ING	INGLEWOOD	VIS
KEL	KELVIN GROVE	WBN
KIL	KILLARNEY GLENGARRY	WHI
KIN	KINGSLAND	WHL
LKB	LAKE BONAVISTA	WIL
LKV	LAKEVIEW	WLD
LMR	MOUNT ROYAL LOWER	WOO
LPK	LINCOLN PARK REDEVELOPMENT	WRT
MAC	MACEWAN GLEN	WSW
MAY	MAYFAIR	WWD
MAL	MAYLAND HEIGHTS	WIL
MAN	MANCHESTER	WIL
MCK	MCKENZIE	WND
MLR	MEADOWLARK PARK	WND
MID	MIDNAPORE	WOO
MPK	MIDDLEPARK	WOO
MPL	MAPLE RIDGE	WOO
MRB	MARLBOROUGH PARK	WOO
MRD	MARDIDALE	WOO
MRG	NORTH GLENMORE	WOO
MRV	NORTH HAVEN	WOO
OAK	OAKRIDGE	WOO
OGD	OGDEN	WOO
PAL	PALLISER	WOO
PAT	PATTERSON	WOO
PEN	PENBROOKE MEADOWS	WOO
PIN	PINE RIDGE	WOO
PKD	PARKDALE	WOO
PRH	PARKHILL STANLEY PARK	WOO
PRL	PARKLAND	WOO
PTH	PENBY MURRAY	WOO
QLD	QUEENSLAND DOWNS	WOO
RPK	QUEENS PARK VILLAGE	WOO
RAM	RAMSAY	WOO
RAN	RANCHLANDS	WOO
RCK	ROSSCARROCK	WOO
RPE	RUTHERDALE	WOO
RVE	RED CARPET MOUNTVIEW MOBILE PK	WOO
RVW	RENFREW	WOO
SAD	RICHMOND	WOO
SAN	RIVERMONT PARK	WOO
SCA	ROCKYRIDGE	WOO
SCE	SCENIC ACRES	WOO
SCR	SUNNYSIDE	WOO
SDC	SANDSTONE CALGARY	WOO
SGY	SANDSTONE VALLEY	WOO
SHG	SCARBORO	WOO
SHN	SCENIC ACRES	WOO
SHS	SUNNYSIDE	WOO
SIG	SILVERADO	WOO
SKD	SKYLINE	WOO
SOC	SOMERSET BRIDLEWOOD	WOO
SOW	SOUTHWOOD	WOO
SPR	SPRINGBANK HILL	WOO
SSW	SPRUCE CLIFF	WOO
STA	SUNRIDGE	WOO
STR	ST ANDREWS HEIGHTS	WOO
SUN	STRATHCONA PARK	WOO
SVW	SUNALTA	WOO
SWW	SOUTH CALGARY	WOO
TAR	SUNNYSIDE	WOO
TEM	SUNNYSIDE	WOO
TUX	TARADALE	WOO
UMR	TUXEDO PARK	WOO
UNI	THORNCLIFFE GREENVIEW	WOO
VAL	TRANSCO	WOO
VAR	TUXEDO PARK	WOO
VIC	MOUNT ROYAL UPPER	WOO
VIS	UNIVERSITY HEIGHTS	WOO
WBN	UNIVERSITY OF CALGARY	WOO
WHI	VARSITY	WOO
WHL	VICTORIA PARK	WOO
WIL	VISTA HEIGHTS	WOO
WLD	WOODBINE	WOO
WOO	WESTGATE	WOO
WRT	WHITEHORN	WOO
WSW	WEST HILLHURST	WOO
WWD	WILLOW PARK	WOO
WIL	WINSTON HEIGHTS-MOUNTVIEW	WOO
WND	WILDWOOD	WOO
WND	WINDSOR PARK	WOO
WOO	WOODLANDS	WOO

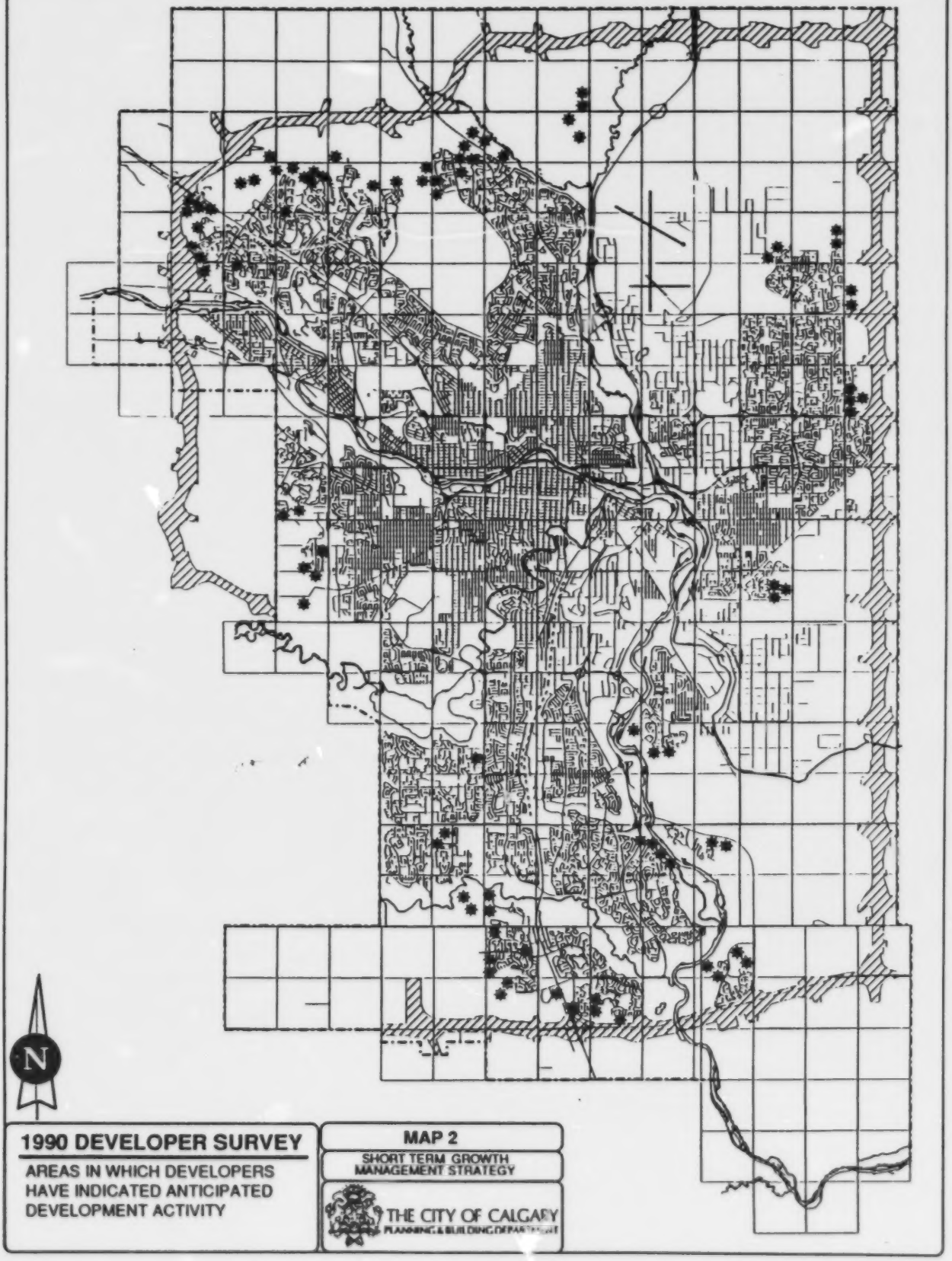
* Canadian Forces Base

SUBURBAN SECTORS

MAP 1
SHORT TERM GROWTH MANAGEMENT STRATEGY

THE CITY OF CALGARY
PLANNING & BUILDING DEPARTMENT

NOTE: BOUNDARIES SHOWN DO NOT INCLUDE 1989 ANNEXATION AREA



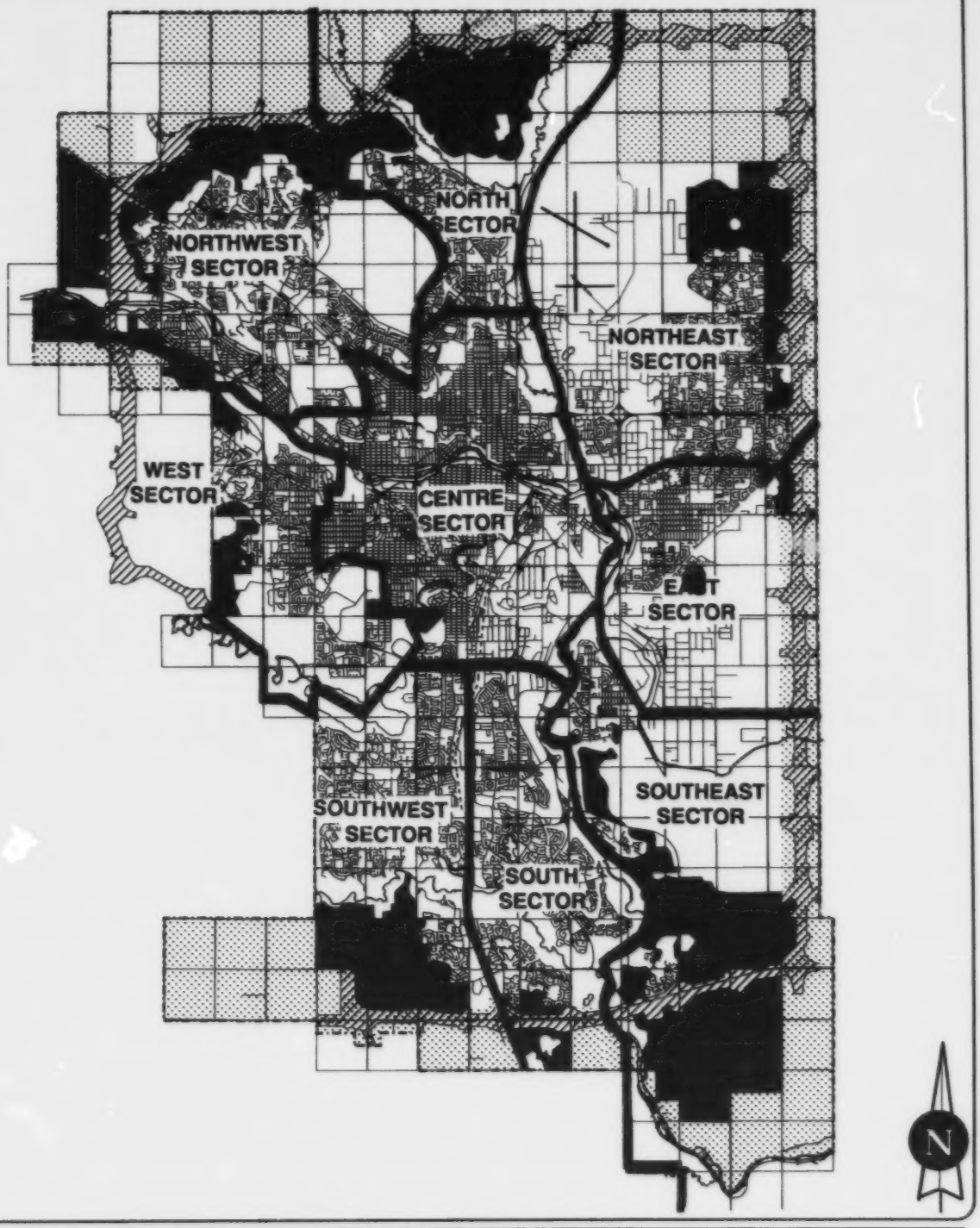
1990 DEVELOPER SURVEY

AREAS IN WHICH DEVELOPERS HAVE INDICATED ANTICIPATED DEVELOPMENT ACTIVITY

MAP 2

SHORT TERM GROWTH MANAGEMENT STRATEGY

THE CITY OF CALGARY
PLANNING & BUILDING DEPARTMENT



UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

SHORT-TERM GROWTH MANAGEMENT STRATEGY
OCTOBER 1990

CITY-WIDE

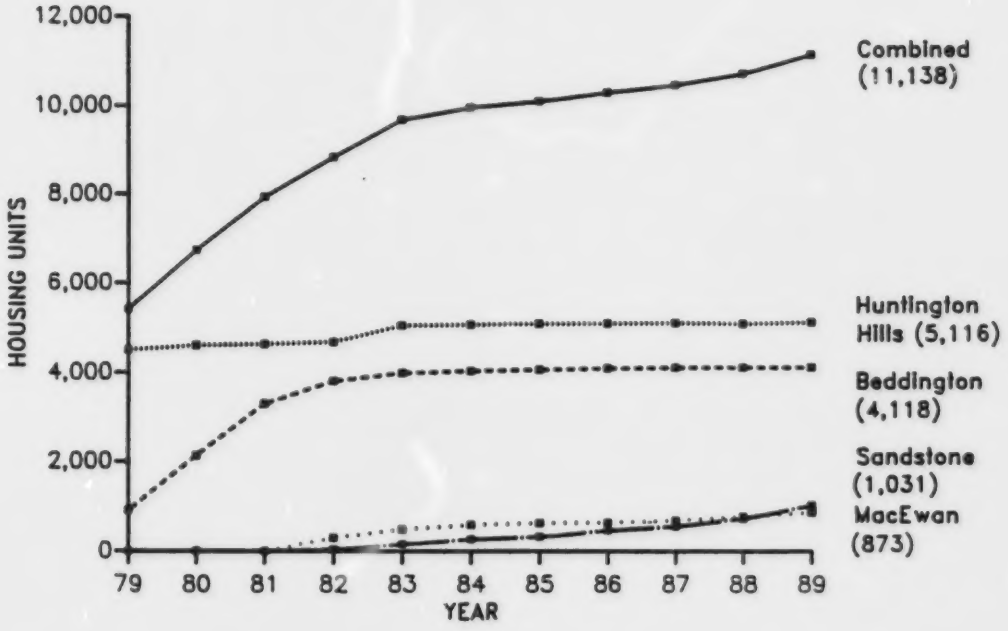
MAP 3

THE CITY OF CALGARY
PLANNING & BUILDING DEPARTMENT

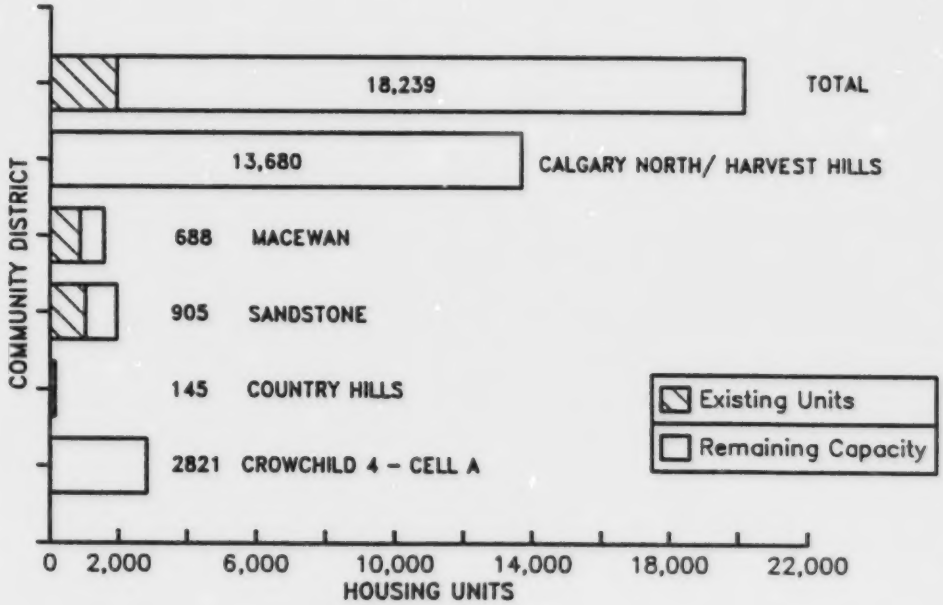
APPENDIX II

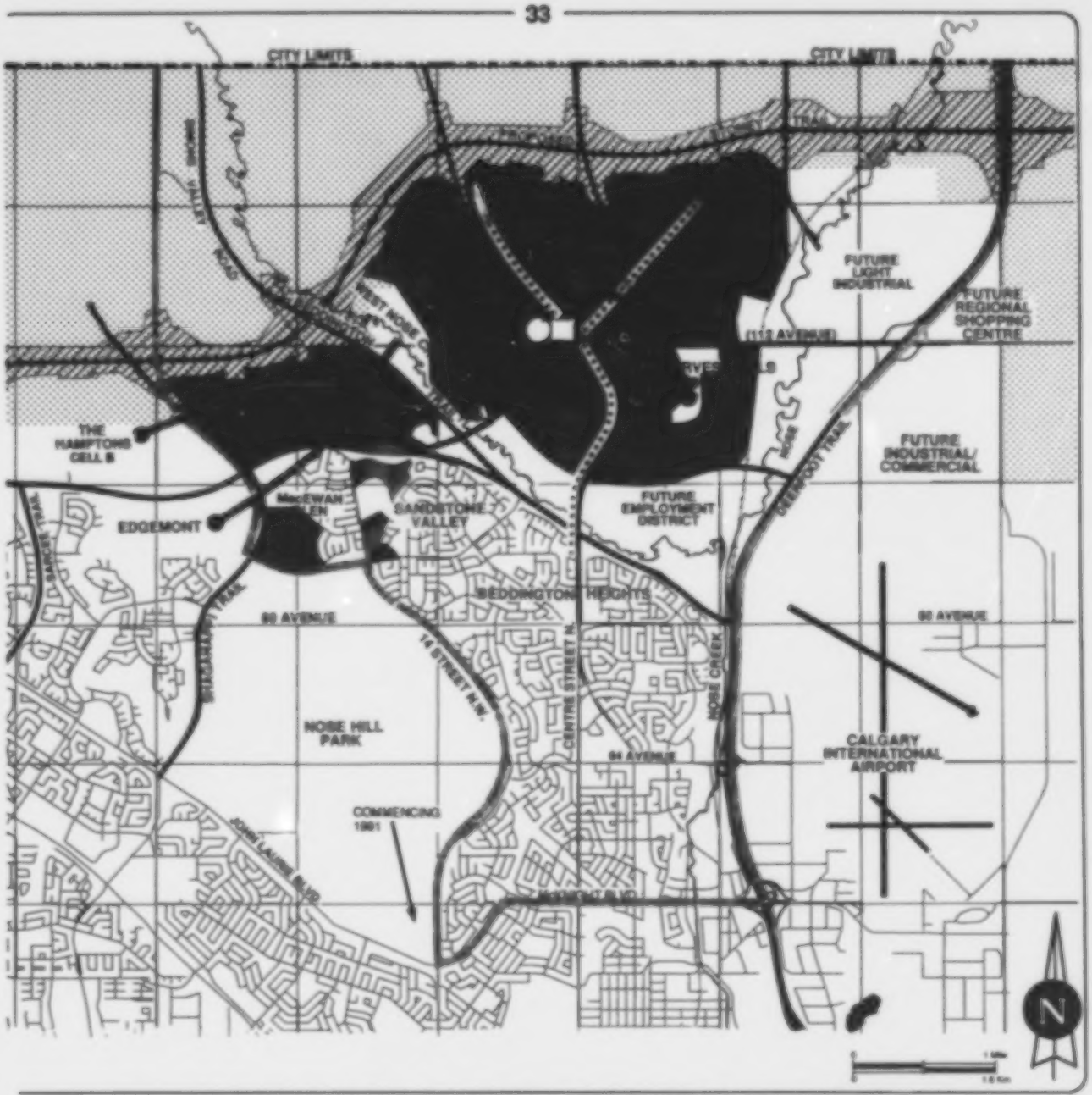
SECTOR PROFILES

HISTORICAL DEVELOPMENT IN THE NORTH SECTOR



REMAINING HOUSING CAPACITY IN THE NORTH SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

- RESERVOIR
- PUMP STATION
- PROPOSED FEEDERMAINS

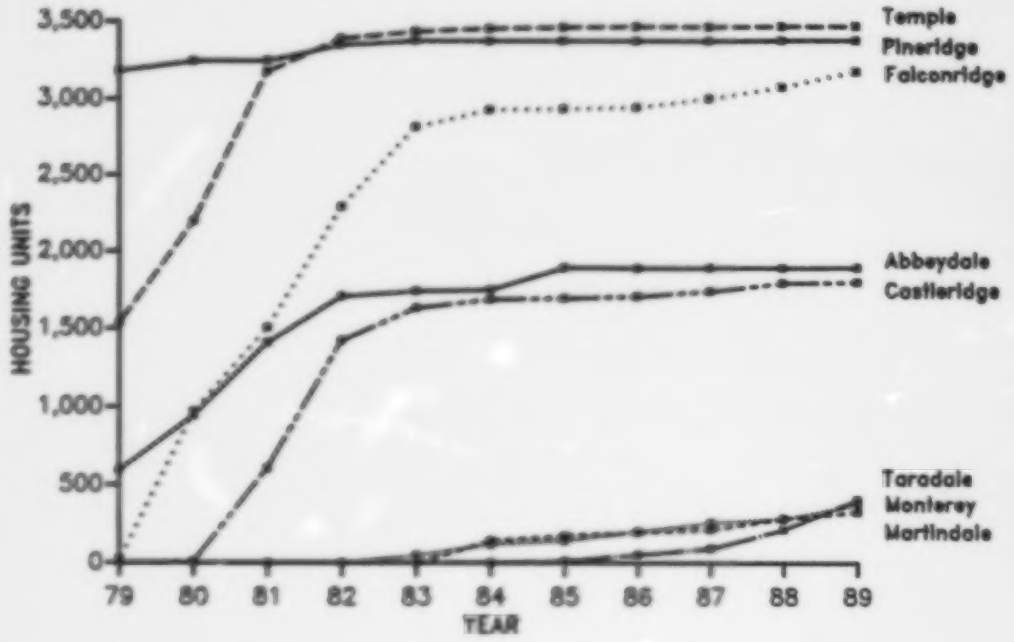
NORTH SECTOR

MAP 1

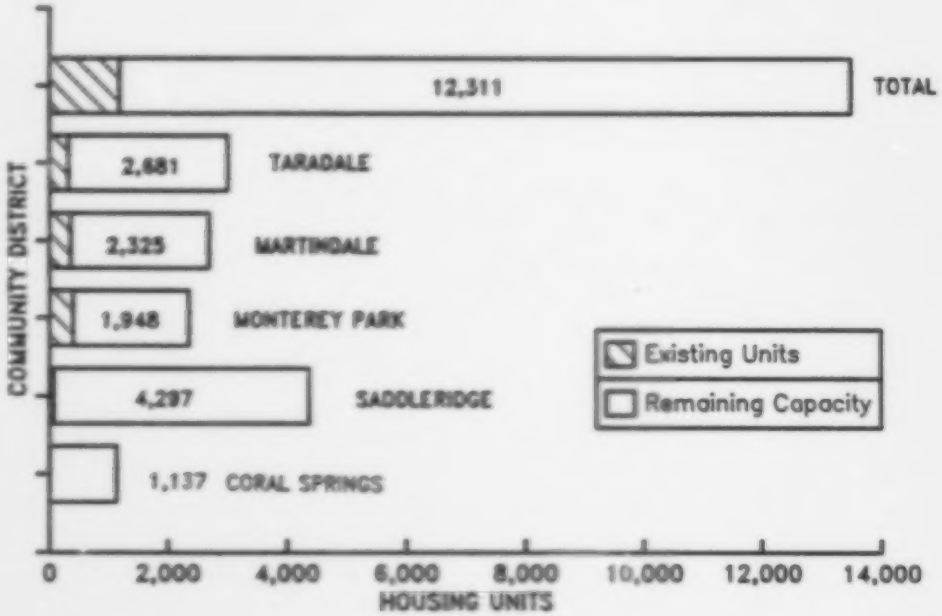
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

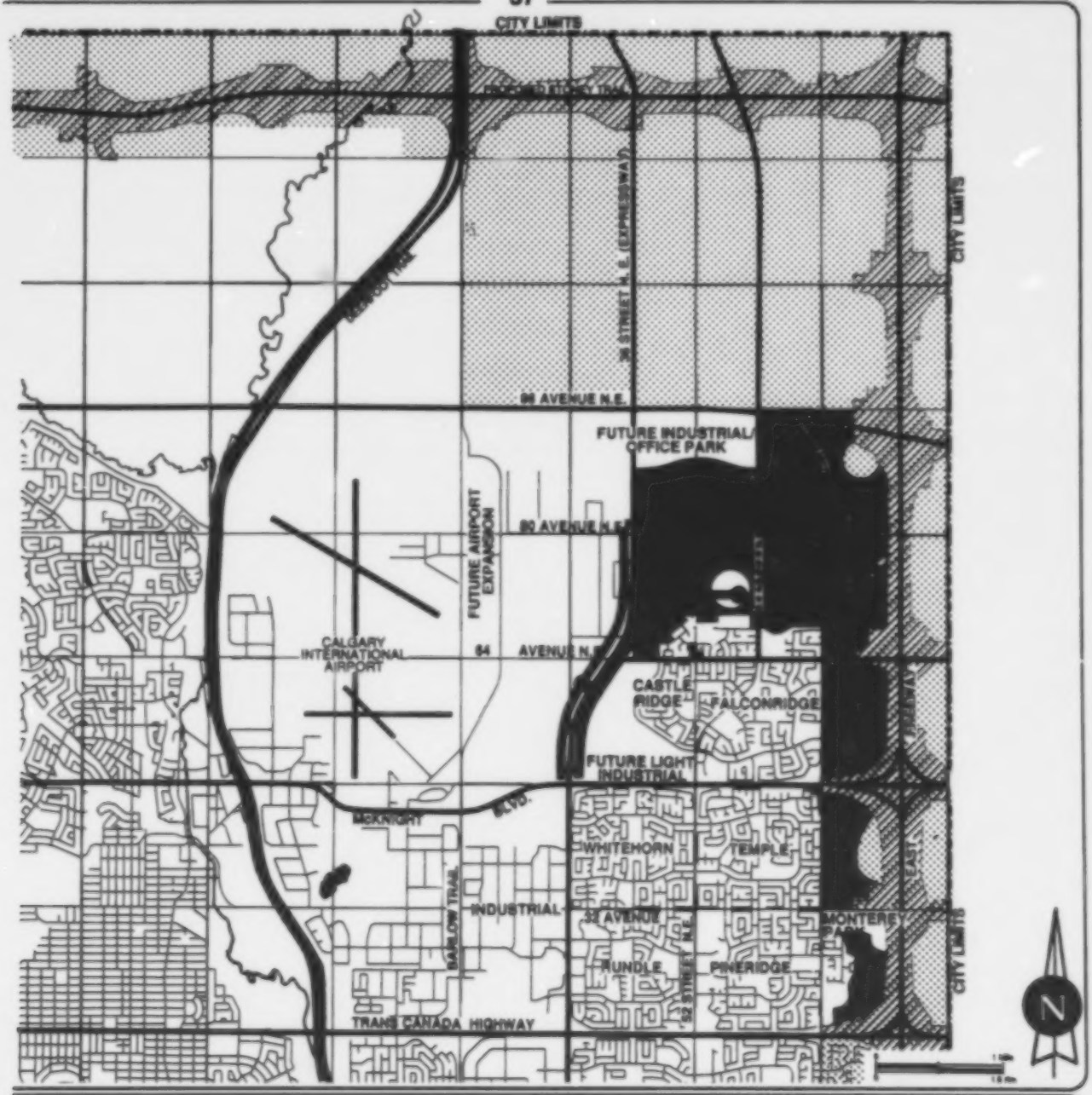
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT IN THE NORTHEAST SECTOR



REMAINING HOUSING CAPACITY IN THE NORTHEAST SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

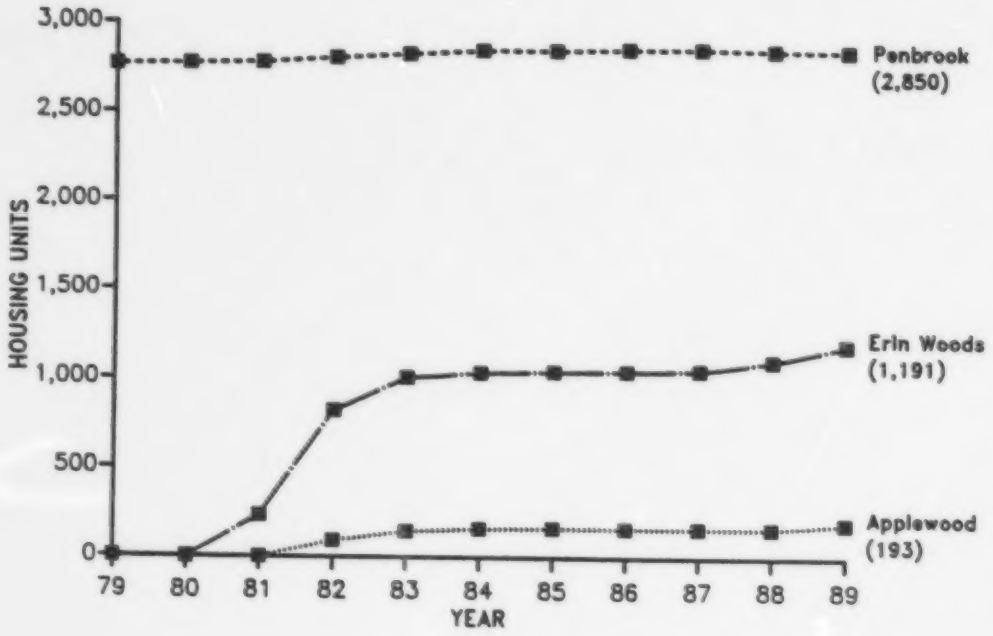
- RESERVOIR
- PUMP STATION
- PROPOSED FEEDERMAINS

NORTHEAST SECTOR | MAP 2

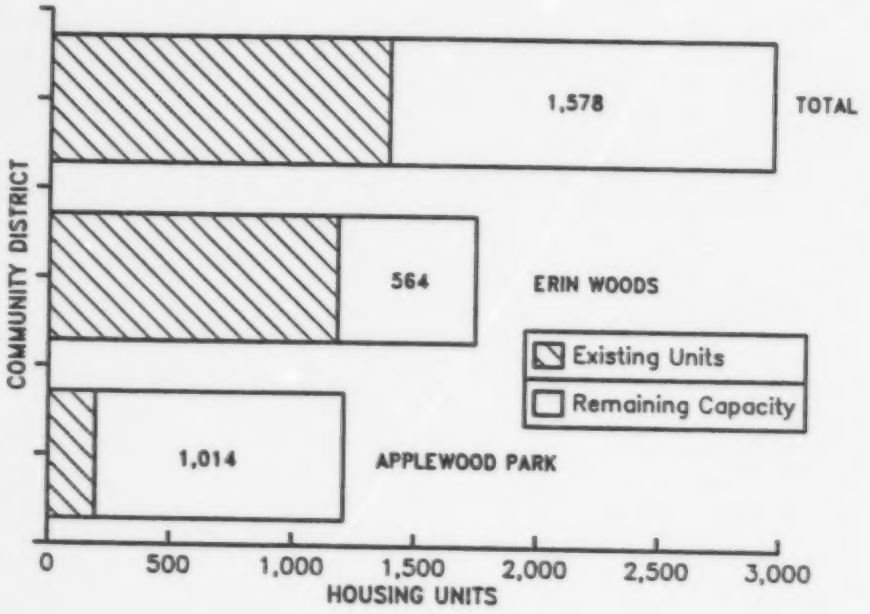
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

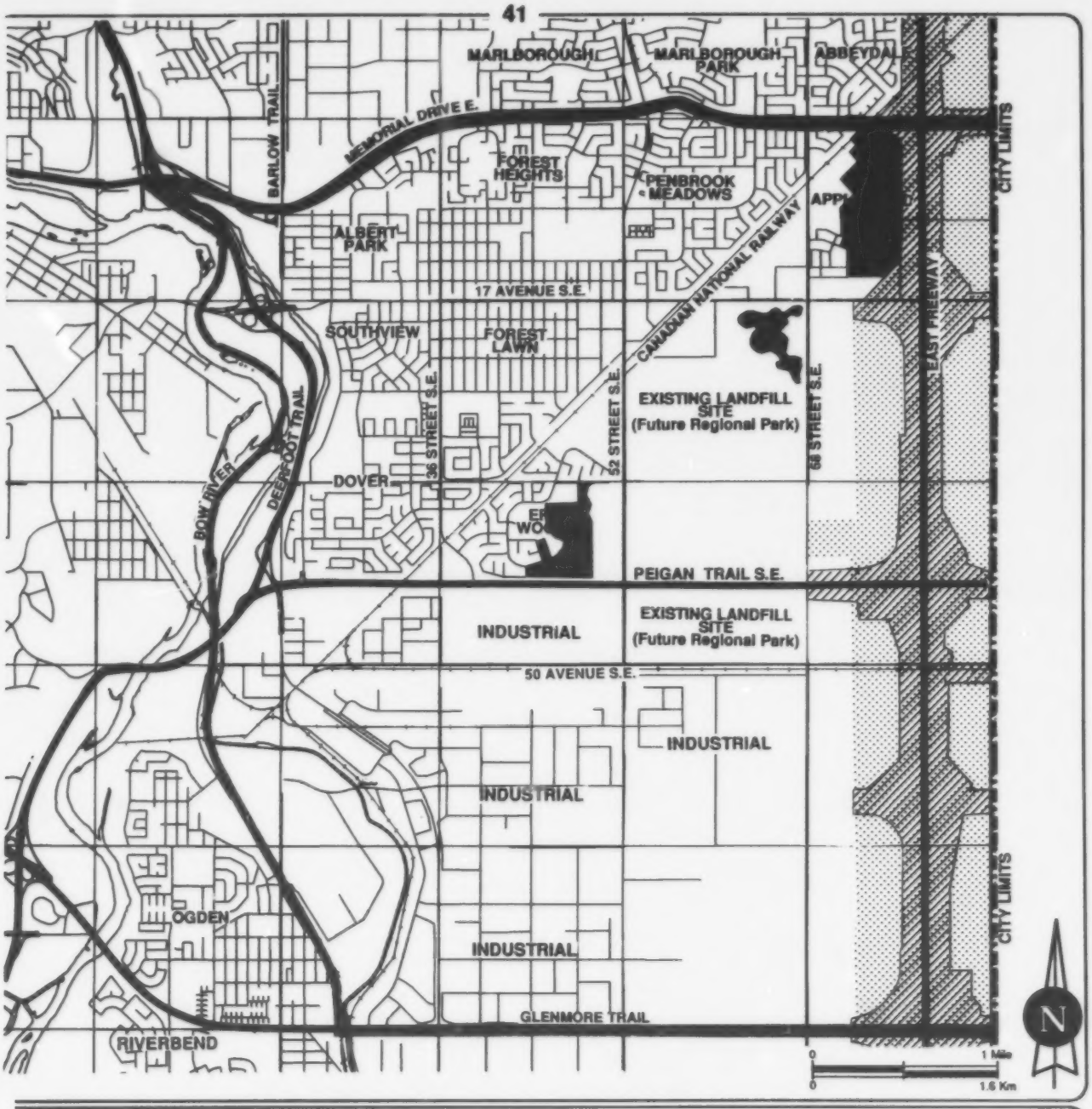
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT IN THE EAST SECTOR



REMAINING HOUSING CAPACITY IN THE EAST SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER
- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

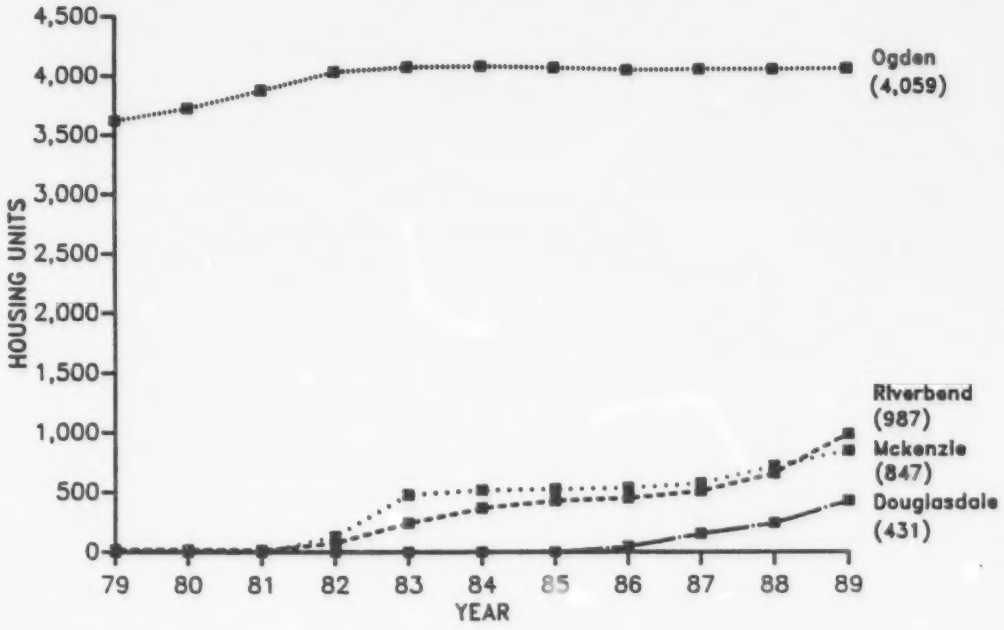
WATERWORKS
- RESERVOIR
- PUMP STATION
- PROPOSED FEEDERMAINS

EAST SECTOR | MAP 3

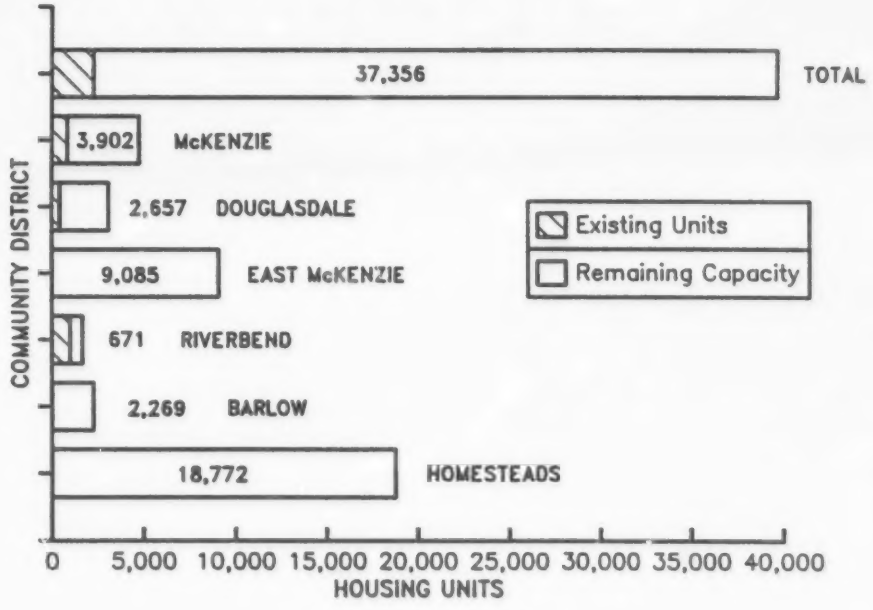
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

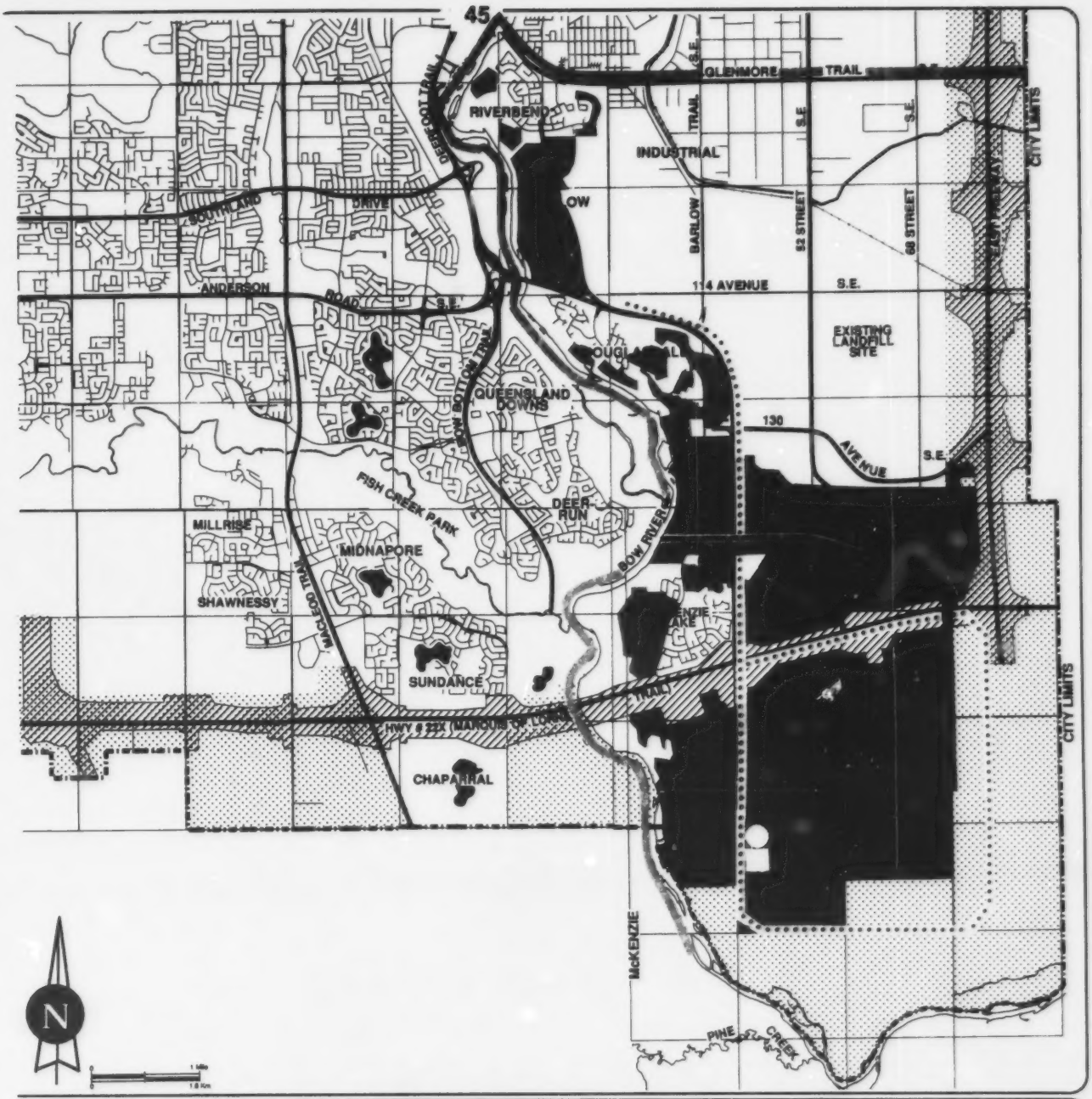
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT IN THE SOUTHEAST SECTOR



REMAINING HOUSING CAPACITY IN THE SOUTHEAST SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

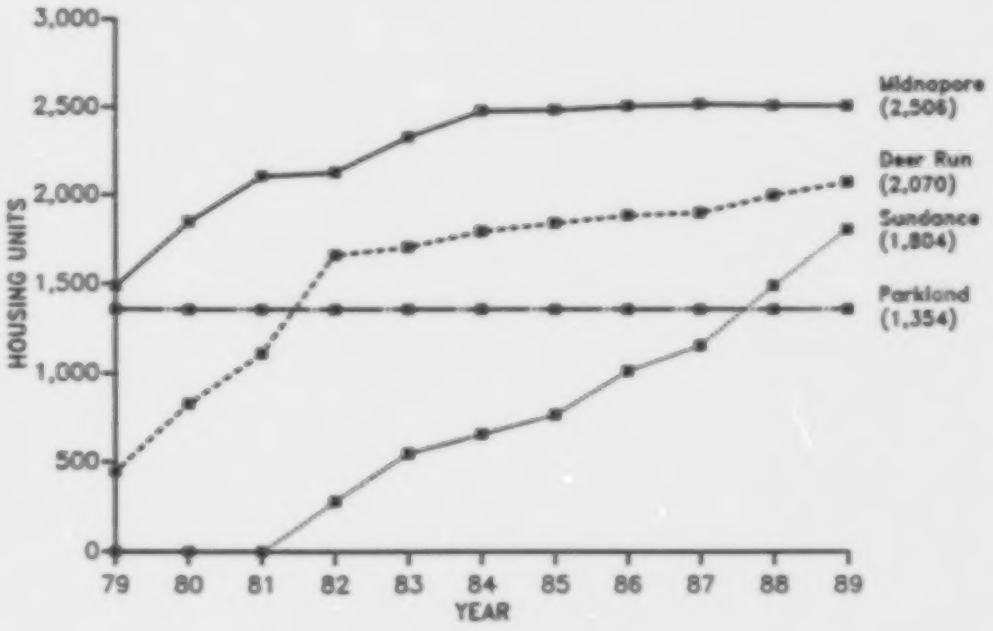
- RESERVOIR
- PUMP STATION
- ..... PROPOSED FEEDERMAINS

SOUTHEAST SECTOR | **MAP 4**

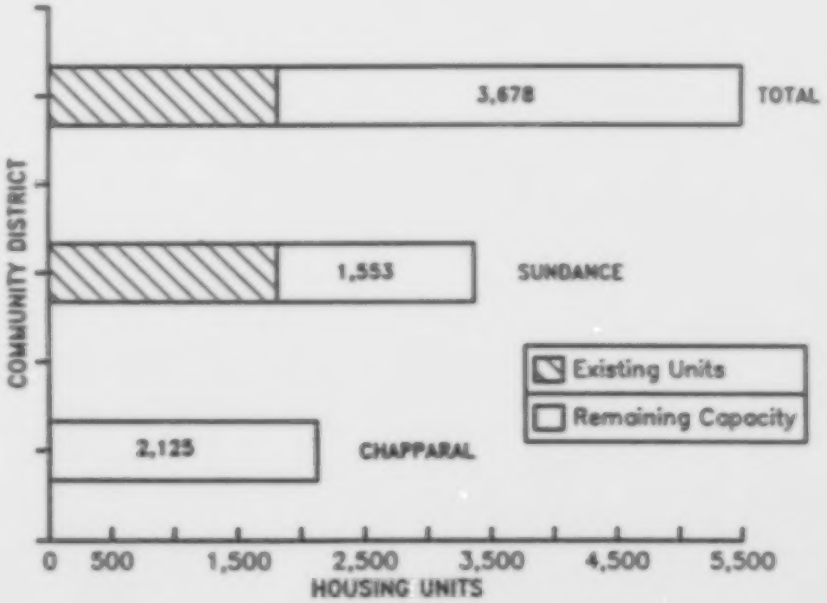
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

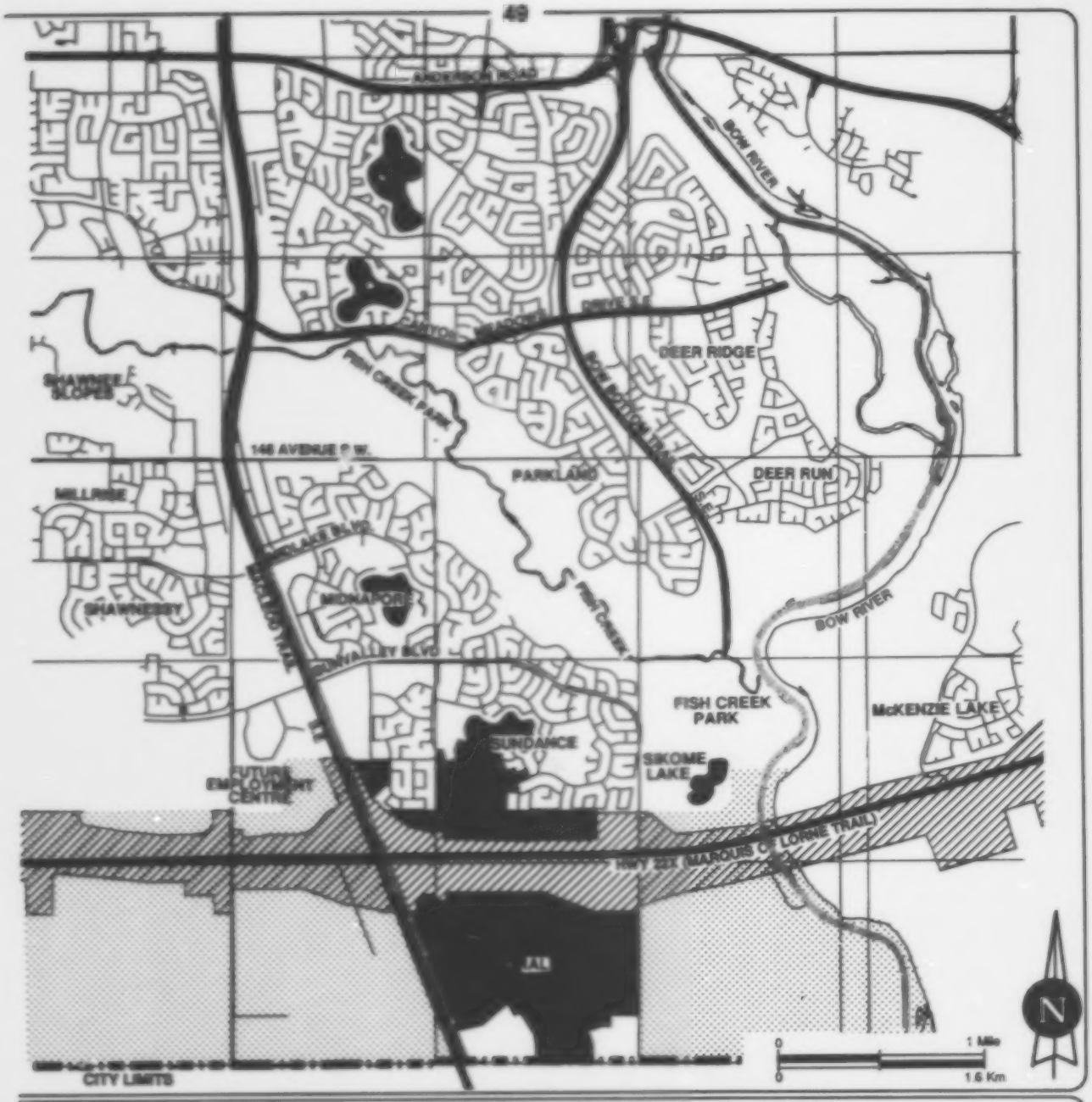
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT IN THE SOUTH SECTOR



REMAINING HOUSING CAPACITY IN THE SOUTH SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

- RESERVOIR
- PUMP STATION
- PROPOSED FEEDERMAINS

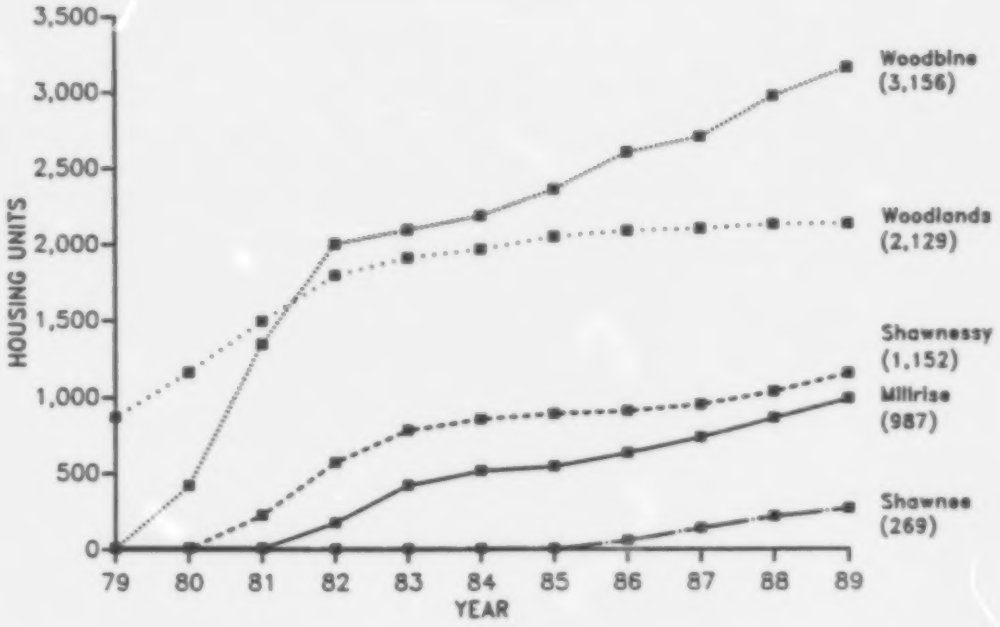
SOUTH SECTOR

MAP 5

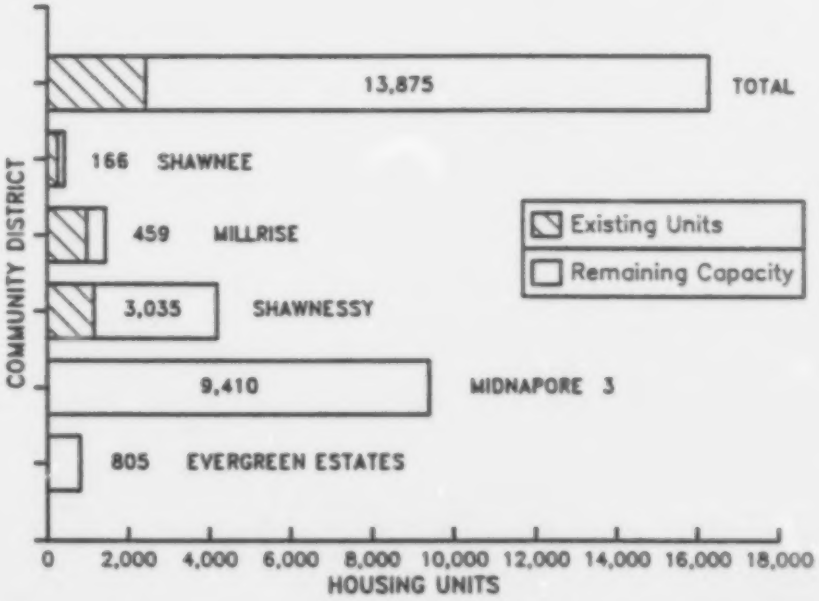
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

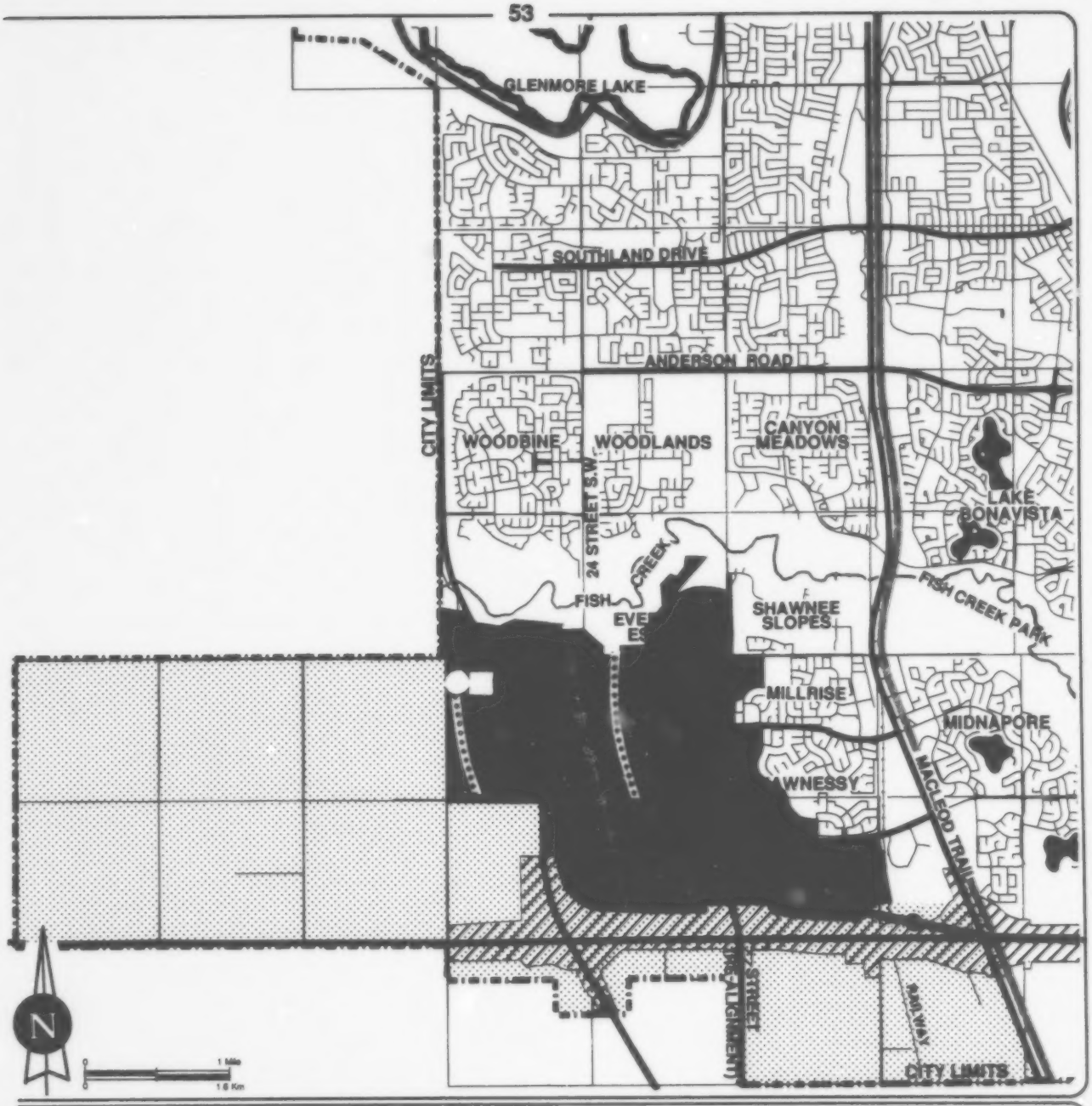
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT IN THE SOUTHWEST SECTOR



REMAINING HOUSING CAPACITY IN THE SOUTHWEST SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

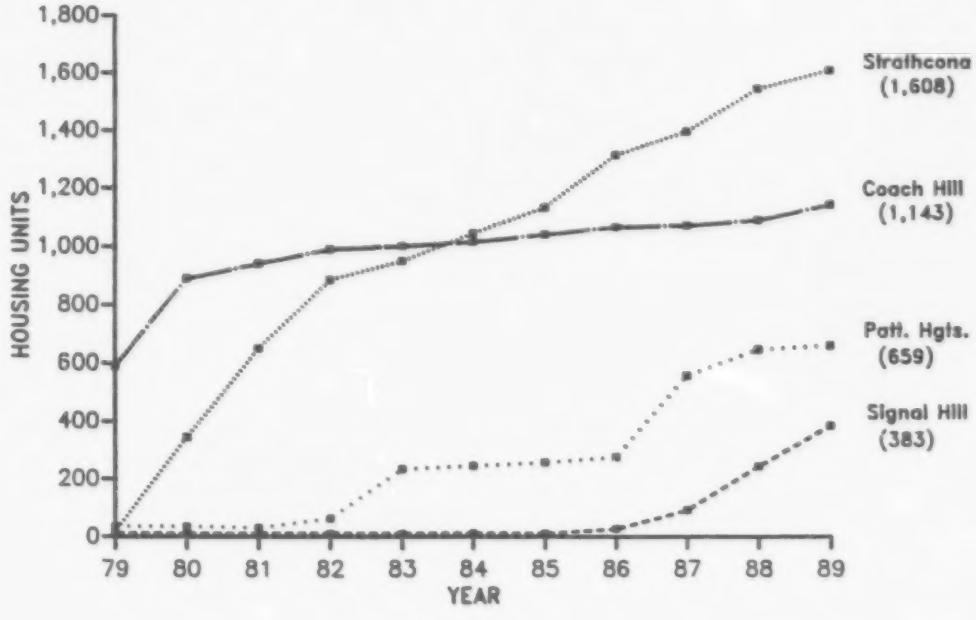
- RESERVOIR
- PUMP STATION
- ..... PROPOSED FEEDERMAINS

SOUTH WEST SECTOR | **MAP 6**

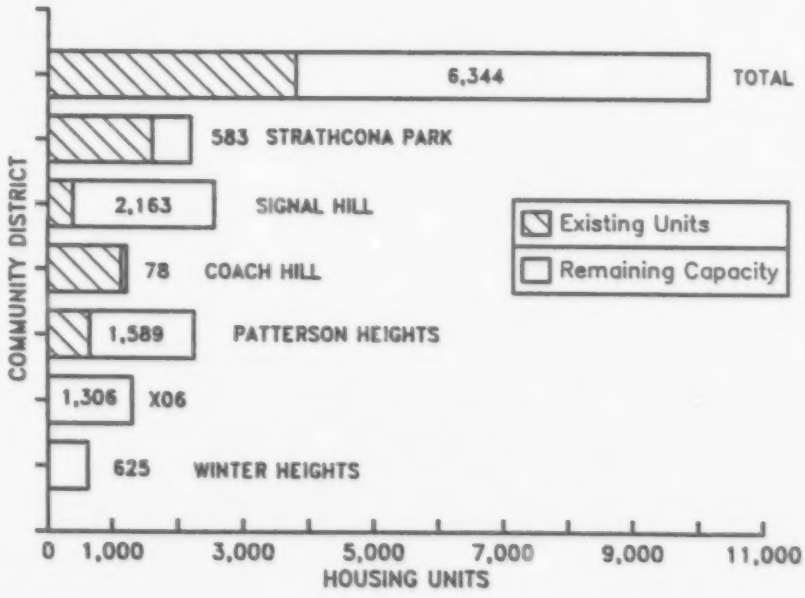
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

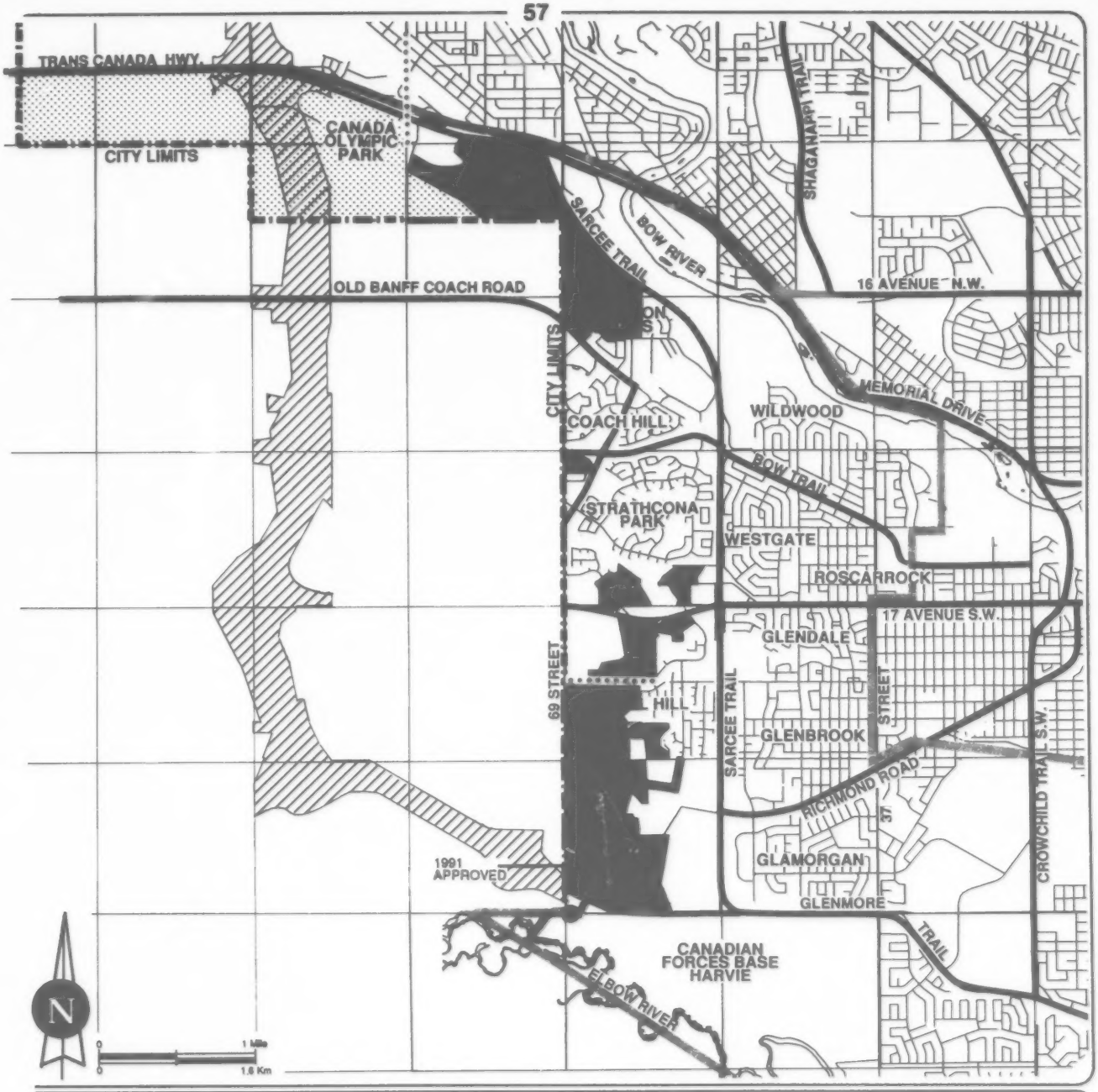
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT OF LANDS IN THE WEST SECTOR (WEST OF SARCEE TRAIL)



REMAINING HOUSING CAPACITY OF COMMUNITIES WEST OF SARCEE TRAIL





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

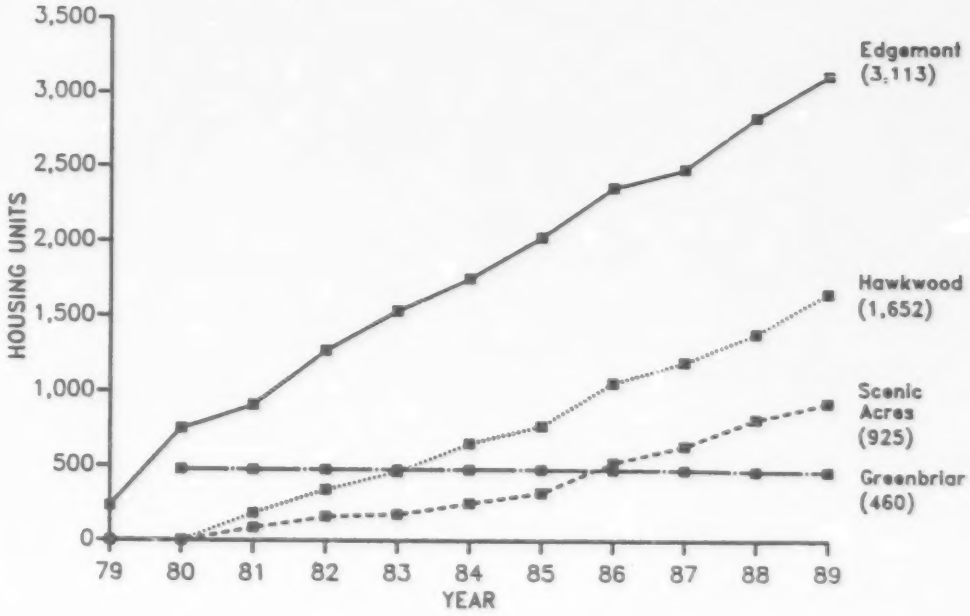
- RESERVOIR
- PUMP STATION
- PROPOSED FEEDERMAINS

WEST SECTOR | MAP 7

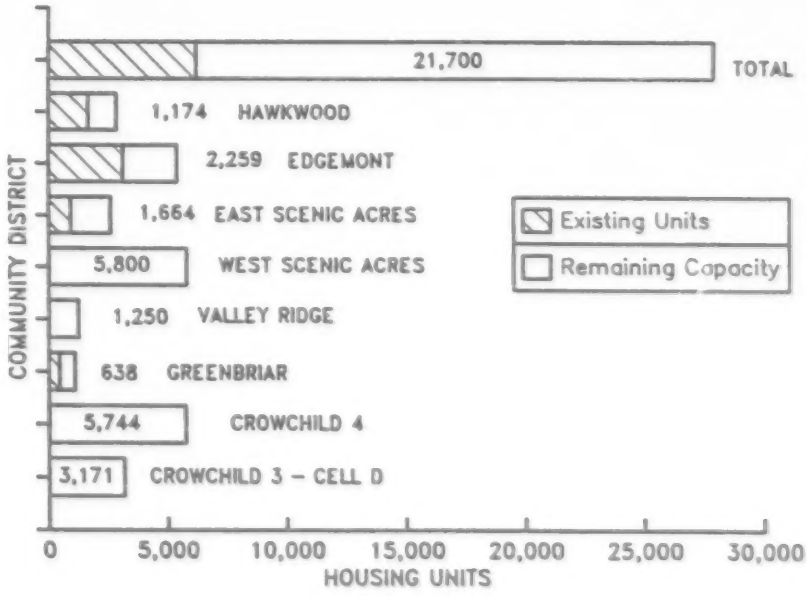
SHORT-TERM GROWTH MANAGEMENT STRATEGY OCTOBER 1990

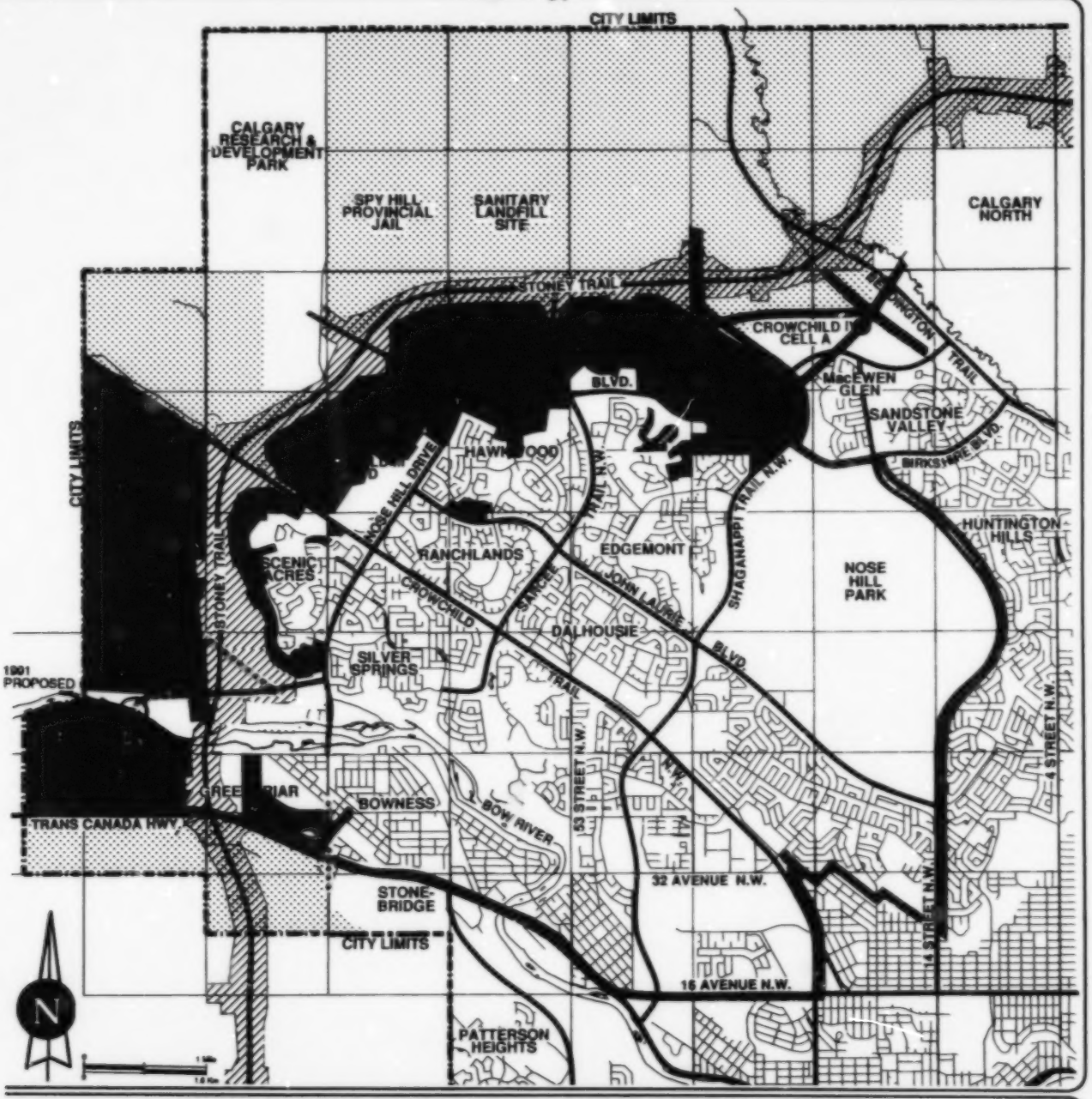
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

HISTORICAL DEVELOPMENT IN THE NORTHWEST SECTOR



REMAINING HOUSING CAPACITY IN THE NORTHWEST SECTOR





UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (AS OF APRIL 1990)

- UTILITY CAPACITY IN PLACE (AREA HAS BOTH WATER AND SEWER CAPACITY IN PLACE)
- SOME UTILITY CAPACITY IN PLACE (AREA HAS WATER OR SEWER CAPACITY, BUT NOT BOTH)
- NO UTILITY CAPACITY IN PLACE (AREA HAS NO WATER OR SEWER CAPACITY IN PLACE)
- SECTOR BOUNDARY
- APPROXIMATE LOCATION OF THE TRANSPORTATION AND UTILITY CORRIDOR
- 1989 ANNEXATION AREA

UTILITY EXTENSIONS TO SERVICE GREEN & BLUE AREAS

SEWER

- PROPOSED SANITARY SEWER TRUNK
- PROPOSED STORM FACILITIES

WATERWORKS

- RESERVOIR
- PUMP STATION
- PROPOSED FEEDERMAINS

NORTHWEST SECTOR — MAP 8

SHORT-TERM GROWTH MANAGEMENT STRATEGY
OCTOBER 1990

THE CITY OF CALGARY
PLANNING & BUILDING DEPARTMENT

APPENDIX III

DEVELOPMENT INDUSTRY COMMENTS

URBAN DEVELOPMENT INSTITUTE CALGARY CHAPTER

SUITE 2010, FIRST ALBERTA PLACE
777 - 8th AVENUE S.W.
CALGARY, ALBERTA T2P 3R5
PHONE: 237-6537

October 10, 1990

CITY OF CALGARY
Planning & Building Dept.
P.O. Box 2100, Stn. M
Calgary, Alberta
T2P 2M5

ATTENTION: MR. PAUL COCHRANE

Dear Sir:

RE: SHORT TERM GROWTH MANAGEMENT
INFORMATION UPDATE - JUNE 1990

We thank you for the opportunity to provide input and to review the final draft of the above mentioned report.

From UDI's perspective, the report has been well prepared using very sound methodology.

We are therefore pleased to support this document as planning document effectively utilizing currently anticipated trends in growth.

Yours sincerely,

R.M. Nolan
Executive Director, UDI Calgary

/ss

cc: J. Dewald
Chairman, UDI Calgary

CALGARY HOME BUILDERS' ASSOCIATION

VIA COURIER

October 1, 1990

Mr. Paul Cochrane, Chairman
Growth Management Technical Committee #8108
The City of Calgary
Planning & Building Department
P.O. Box 2100, Station M
Calgary, Alberta
T2P 2M5

Dear Mr. Cochrane:

RE: SHORT-TERM GROWTH MANAGEMENT STUDY
OUR FILE # 701.8

The Builders' Council members of our Association appreciate the opportunity we have been granted once again to participate in the Short-Term Growth Management Study. We sincerely appreciate the privilege to have our builder and developer members contribute their views and expertise based on their indepth activity and knowledge.

The Calgary Home Builders' Association endorses and supports the content of the strategic plan as amended after our meeting of September 11 with Mr. Cochrane and other members of the Planning Department. We believe it fairly represents the views of our Association and, therefore, it receives our full support.

We wish, however, to reiterate two concerns expressed at this meeting. Firstly, based on the number of starter homes which our member companies have built and will continue to build over the next year in the northeast sector of Calgary, it is inevitable that the City will run out of serviced land presently available to the builder and consumer at existing low prices. As a result, we submit that starter homes in the future will be built on more expensive land in various sectors of the City. This will substantially increase the cost of housing to the potential "starter" home buyer in Calgary, due primarily to increased land costs. This will also negatively impact the measure of affordability for certain new home buyers.

. . . . . /2

#100 3016 5th Avenue N.E., Calgary, Alberta T2A 6K4 Telephone (403) 235-1911

Secondly, it has become very apparent to our Association builder members that the lack of schools in several of the new subdivisions is causing consumers not to want to live in a specific area. An example is Scenic Acres. You will note that the percentage portion of single family houses built in the northwest has dropped slightly. Based on our research, it is primarily due to a concern that potential new home buyers have in terms of the schools their children will be bused to. These factors can impact the demographics of potential new home buyers in certain sectors of the City of Calgary.

Calgary Home Builders' Association is committed to continue working together with the City in building the finest city and providing the best residential housing in our nation.

Respectfully,

J.R. (John) Klassen
Executive Vice President and
Chief Executive Officer

JRK:jcs
bcc: Eldon Loucks - President, C.H.B.A.
Harry Stepper - Chairman, Builders' Council Committee
Garth Mann - Chairman, Condominium/Multi-Family Committee
Dennis Little - President, A.H.B.A.